What's New in QuickDOC 2.1.2 (QDPortal 1.0.9)

QuickDOC and QDPortal

QDPortal Version 1.0.9 is compatible with the latest **DOCLINE Version 1.6**, released July, 2003. It is a minor change from 1.0.8, the most obvious change being in the display of popup windows during the DOCLINE session. Download information for QuickDOC (latest version 2.1.1) is always available at: http://nnlm.gov/quickdoc/InstallQD.html

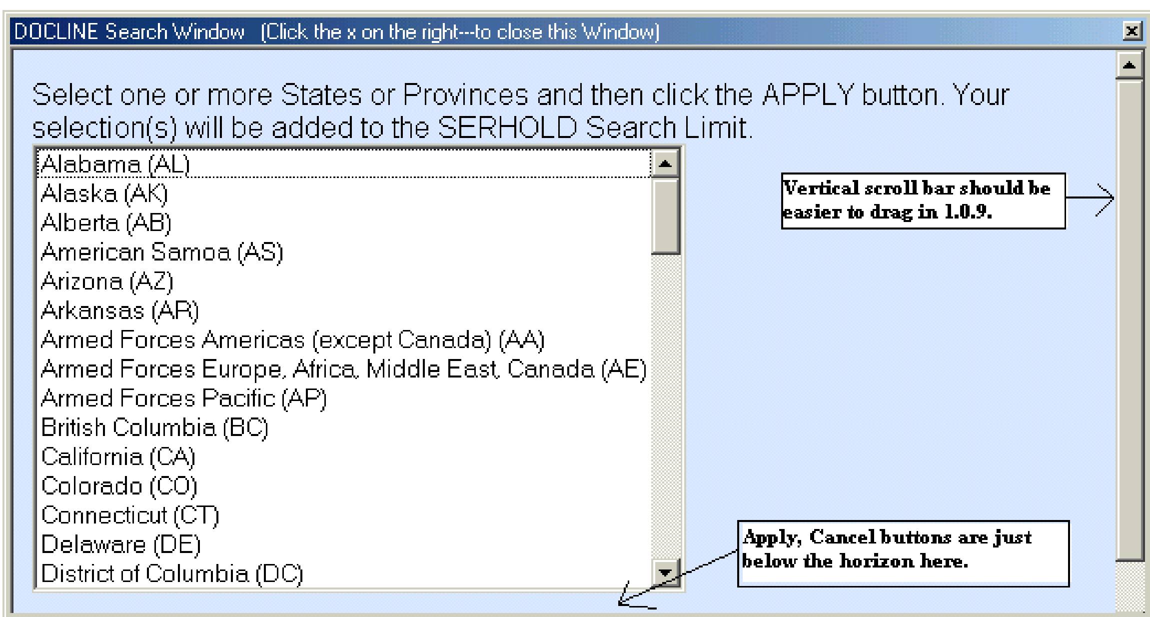
QDPortal 1.0.9

A new version of QDPortal, Version 1.0.9, is now the latest version. Download information is always available at: http://nnlm.gov/quickdoc/InstallQDP.html. Changes in 1.0.9 are as follows:

Popup Windows in DOCLINE are now somewhat wider

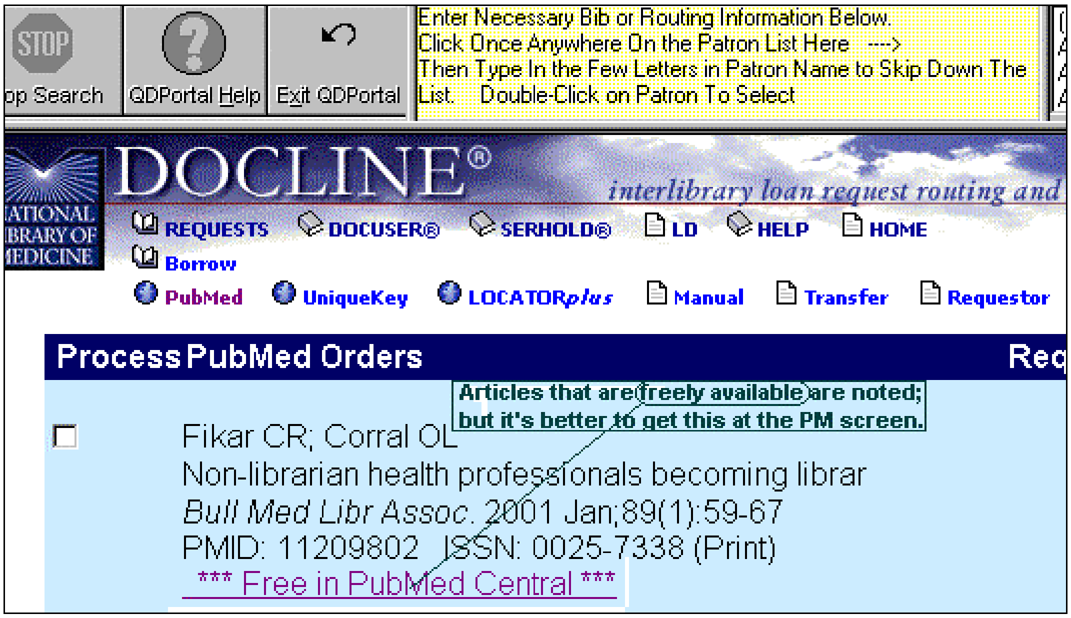
Popup windows, such as those that display the list of states/provinces in the SERHOLD search, have always been a special challenge in QDPortal. When the browser gets the notification to open the window, it wants to respond by opening a new instance of Internet Explorer. Since this might lead us who-knows-where, QDPortal intercepts this message and opens its own window instead. Not having any idea which window this might be, it just chooses a general size and hopes it will work.

Version 1.0.9 has enlarged this initial size a bit, to make the vertical scroll bars a bit more accessible:



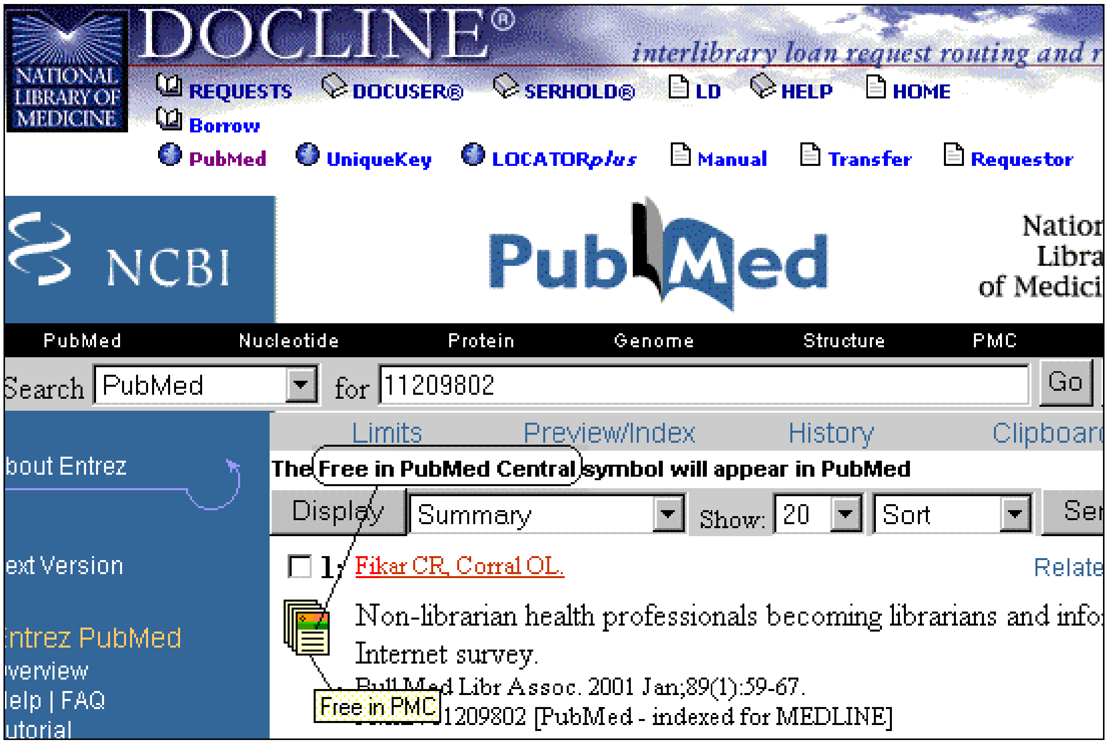
Popup Window displaying PubMed Central item is now full-screen

In most cases the regular popup window size will be satisfactory, but the one situation where it will inevitably be undersized is when the full text screen in **PubMed Central** is displayed. There are two ways to reach the screen in PubMed Central that contains full text of the article requested (either HTML or PDF in most cases). One is at the **Process PubMed Orders** screen in DOCLINE, which appears after you click **Order** and **Send To** in PubMed, or if you simply enter the PubMed UI in the Unique Key form on DOCLINE:

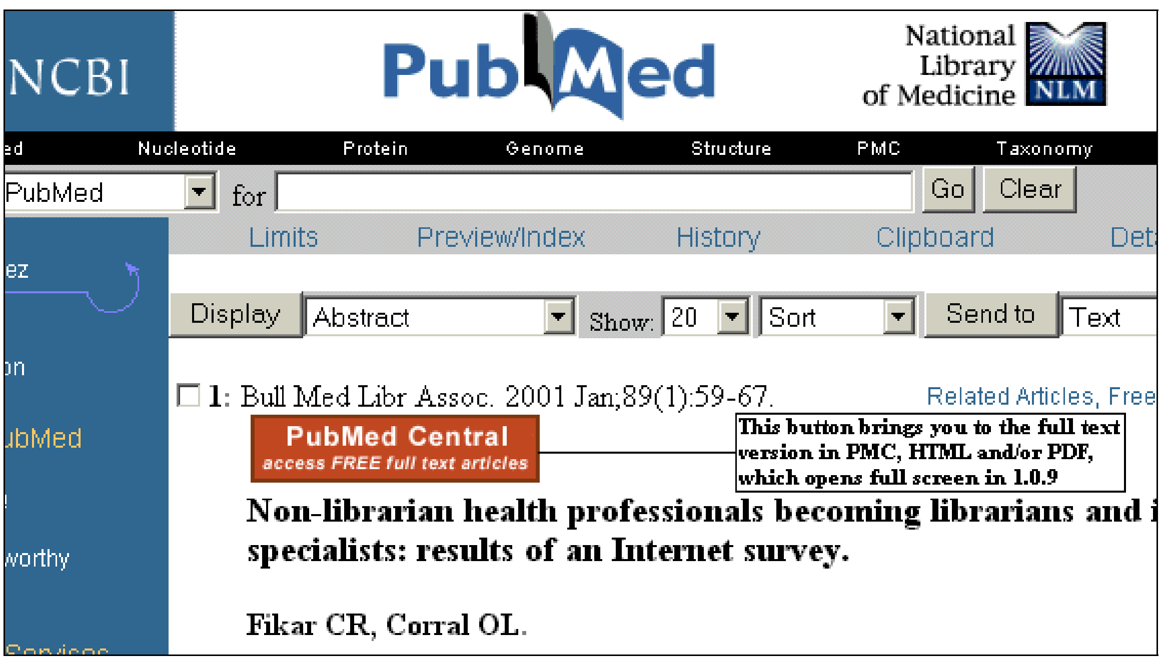


Clicking the link above will bring you directly to the **free full-text** page in PubMed Central.

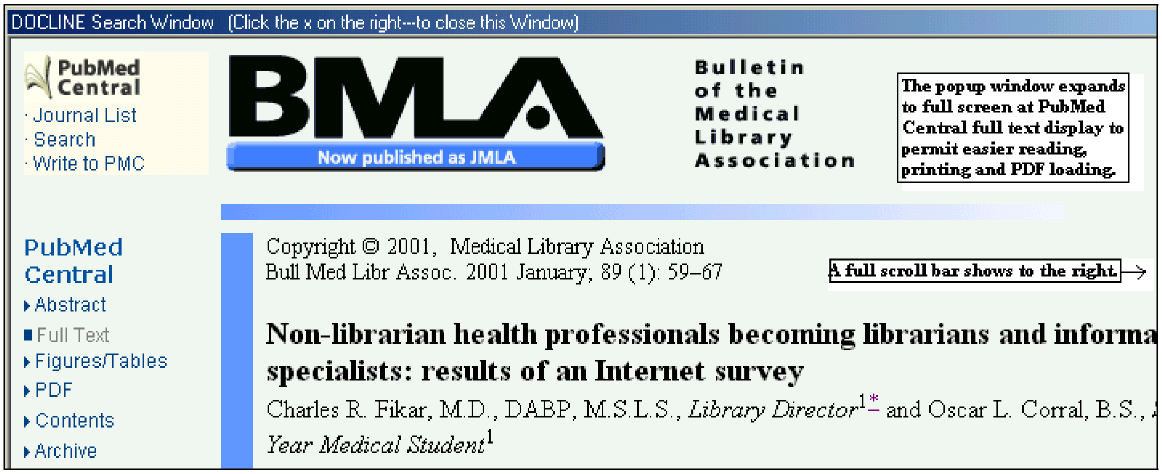
In most cases, though, you will be searching in PubMed when you get notice that the item you want to order is **free in PubMed Central**:



Clicking the “Free in PMC” icon will bring you to the Abstract page:



Clicking the red square will bring you to the full-text entry, which QDPortal will show full-screen, in a new window:



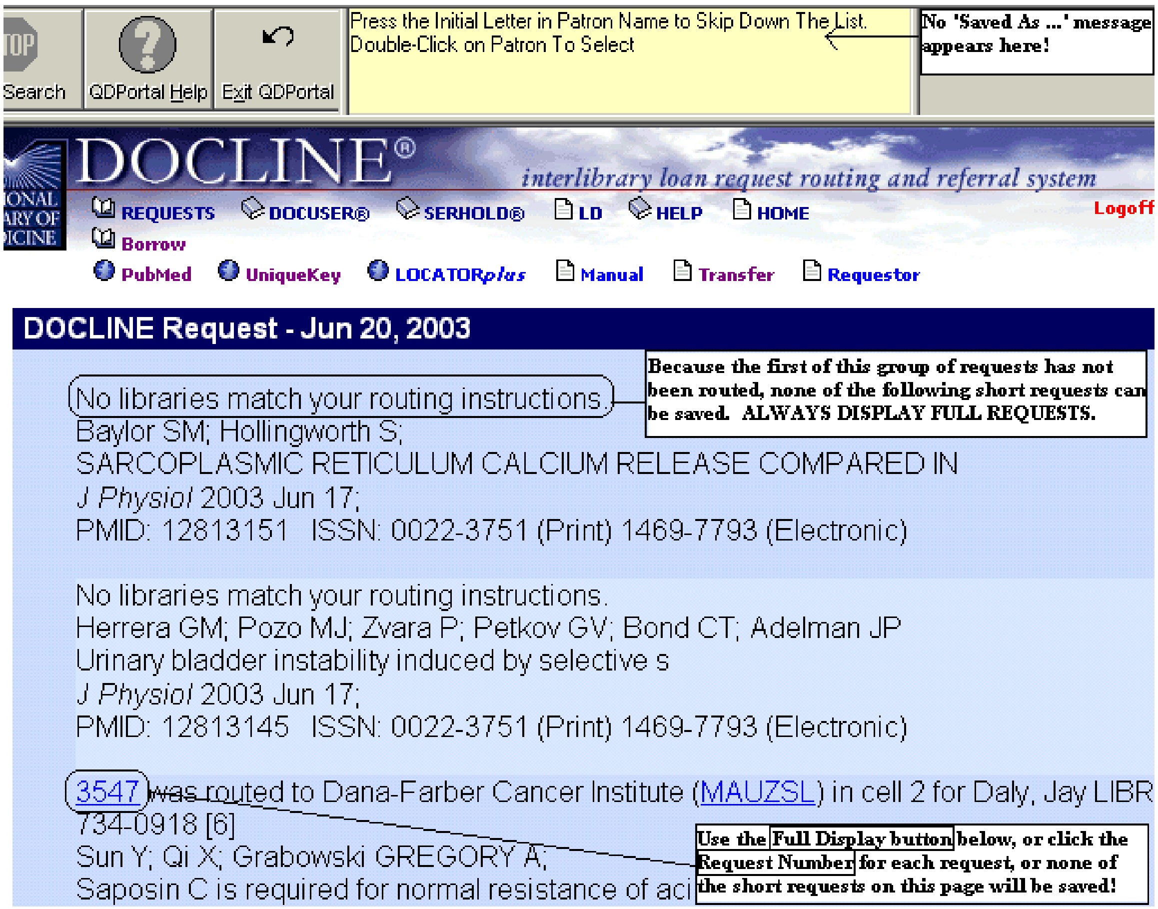
Click the x at the upper right (not shown above) to close the Window when you're finished. You can right-click in any empty spot on the window to get a **Context Menu**, with **Back**, **Forward**, **Print**, etc. **PDF**s will also appear full-screen in this window, but the Context Menu in **Adobe Acrobat** will be different, so you'll have to close the window and re-click the red square on the Abstract Page to get back to the view above.

Reminder: ALWAYS use the Full Display on DOCLINE Borrows

As has been mentioned often, while QuickDOC will save as much information as it can when the short version of the DOCLINE Request is displayed, it is ALWAYS better to display the full request as well. There is information on the full display that simply isn't available on the short display.

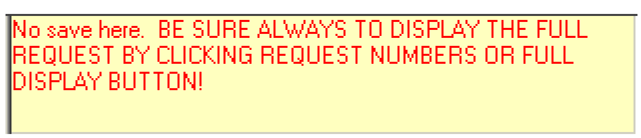
As a further incentive, there are occasions when the Short Display may be formatted in such a way that none of the items can be saved. In particular, this happens when you have a group of requests entered for one patron and you have limited the number of cells to route through, or have otherwise restricted the full routing of the request. In the event that one or more of this group of requests finds no matches in the restricted routing, the Short Display may prevent ANY of the items from being saved from the group displayed.

Here's an example where two of the three requests were for journals with no holding libraries in the first four cells:



When parsing the page, QDPortal expects to find a Request Number at the top. Because it is missing, no attempt will be made to save whatever data is on this page. Since request number 3547 is buried behind two unsuccessful requests, it will never be saved in the short display format.

Either click the Request Number itself or the Full Display button (out of sight at the bottom of the page displayed above) to get the Full Display Page, where the box at the top will tell you that the Full Request has been saved to file C:\QDBorrow\QDPBData.txt. As a reminder, beginning with QDPortal version 1.0.9, the box at the top will change to the following when the first request begins with “No …”:



First steps toward integrating QDPortal and QuickDOC

As a first step toward bringing QDPortal into QuickDOC, Version 2.1.2 begins the process by moving data that has previously been kept in the Registry of each local machine to the central QuickDOC.MDB database. Only data that is specific to the machine will remain in the Registry, although some values will be replicated on the local machine as a backup to the main database values.

These newly imported values, along with most of the new Local Preferences values, are stored in the tblLocals Table of QuickDOC.MDB.

Journals Table Duplicate NLMUIs Updated

The original **tblJrnls** in the QuickDOC.MDB database was created back in July 2000 by downloading the information from the old text-based Journals Indexed in MEDLINE and batch-importing the data into athe newly-created table. As a part of that import process (an infelicity, apparently), a number of Journal Titles came in with duplicate NLM Unique Identifiers. This duplication went generally unnoticed because QuickDOC first does the search by ISSN, if it's there, and only searches by NLM UI if no ISSN is included in the request imported from DOCLINE.

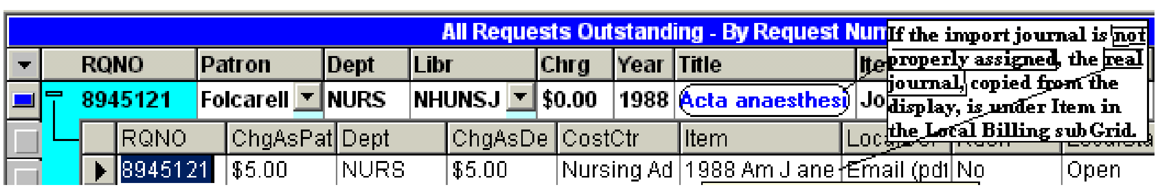
Inevitably, of course, requests arrived with no ISSN. When the Import process then went to do the lookup in tblJrnls, it defaulted to a lookup by NLMUI. That's when the duplication became apparent. All journals with one of the duplicated unique identifiers would show up on the Grid with the name of the first of the duplicates (alphabetically). Since the program only expects to find one match, it took the first one it found. In some cases where 20-25 titles all had the same NLM UI, all of these titles would appear under the first name.

Obviously, not good. As part of the 2.1.2 update, all of these duplicate NLM UIs will be updated to the correct unique identifier. The first time you start up QuickDOC after updating, you'll see on the Splash Screen:

Since there are about 400 of these (out of 11,000 records) to update, it may take a minute or two. If you're interested in which titles were updated, you can see a list of them in the file **DupNLMUI.txt**, which is located in the QuickDOC Program folder. You can also use this file to update the NLM UIs manually, if the automatic process should fail for some reason.

Editing incorrect journal titles in current files

While this update will correct the duplcate NLM Unique Identifiers in the Journals Table, preventing future confusion, you may have incorrect journal citations in the current file (although, because the NLM UI is not the first choice for lookups, this is not a common occurrence). If you discover a title that you think may be incorrect, you can check the **associated Local Billing Information Grid**, which can be displayed by pressing the F4 key and then clicking the + sign to the left of that row:



In the case above, where ***Acta anaesthesiologica*** shows in the **Title field of the Requests Outstanding Grid**, the associated **Item field in Local Information** shows ***Am J anesthesiology***. Since the Item field in Local Information was copied directly from the Journal Title Abbreviation field in the DOCLINE display, you can generally rely upon that information (with the understanding that, when you use the method described below to update the journal title in the Title field, the underlying Item field will be updated as well). Using this method will be much quicker than searching for the paper backup on each request (assuming you even have the backup printouts).

Reminder: Be sure to use ISSN or NLM UI in Manual Requests

In a related matter, when you input Manual Requests on DOCLINE, be sure to include the ISSN if you have it, or the NLM UI if the ISSN isn't available, so that QuickDOC will have something to look up reliably when it tries to match the Journal you've ordered with an entry in tblJrnls of the database. Without a unique number of some sort to check, the match process becomes much less accurate.

New Index added to tblBorrowItems

The original **tblBorrowItems** included indexes on the fields for Request Number, Department, Date Received, Journal, Lending Library and Patron. Indexed fields will speed up searches made using those fields (although they add bulk to the database as a whole). The first time you start up version 2.1.2 of QuickDOC, the program will add an index on the **BorrowStatus** field. This should improve load time for searches that include the Status of the request, specifically on the initial Borrow Grid, which always loads the **Requests Outstanding Grid**, and where the Request Status (Outstanding or In Queue for Loansome Docs) is obviously a crucial search element.

The first time you start up QuickDOC after updating to 2.1.2, after the NLMUI check you'll see on the Splash Screen:

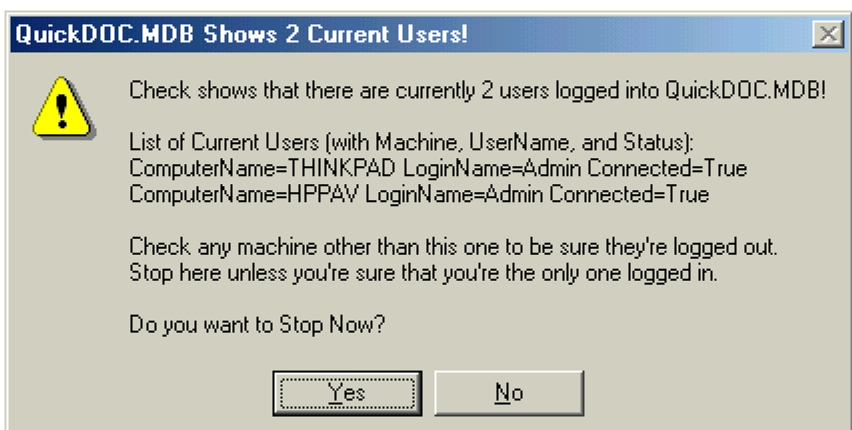
This may take a moment or two, depending upon the size of the database, but no more than that.

Reminder: Be sure that no one else is using the db during an update

After installing any QuickDOC Update, the first time you start up the program it will check to see whether this update makes any change to the database structure, or does any batch updating of database records (the update to version 2.1.2, obviously, does both). If so, it will go ahead and make the changes to the database. This only occurs on the first machine to start up with the latest update, since any machines updated after that one will, of course, note that the changes have already been made to the shared database and move on accordingly.

To prevent damage to the QuickDOC.MDB database during ANY update, it is always good practice to be sure that the machine being updated (and starting up just after the installation process is complete) is the only one logged in to the database at that time.

In the version 2.1.2 update process, the program will check before beginning the database update and let you know if more than one current user is logged in:



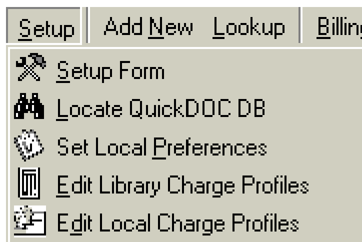
In the case above there are two users currently logged in. Because all users currently have the **UserName Admin**, only the **machine name** is useful in identifying who else may be logged in. In the case above, since I know that I am using the machine with the **ComputerName HPPAV**, I should check to see who is using the machine **THINKPAD** and ask them to log out of QuickDOC before proceeding.

In some cases, particularly where the second user never properly logged out of QuickDOC (say the machine froze up, for whatever reason, and the user never bothered to log in and out of QuickDOC after rebooting), you may see a second user listed even though they are not actually logged in at the moment. In such a case you may safely continue on, but it's always smart to check first and be sure that there is no other user currently reading and writing to the database, to minimize the chance of database corruption.

New Local Preferences Form

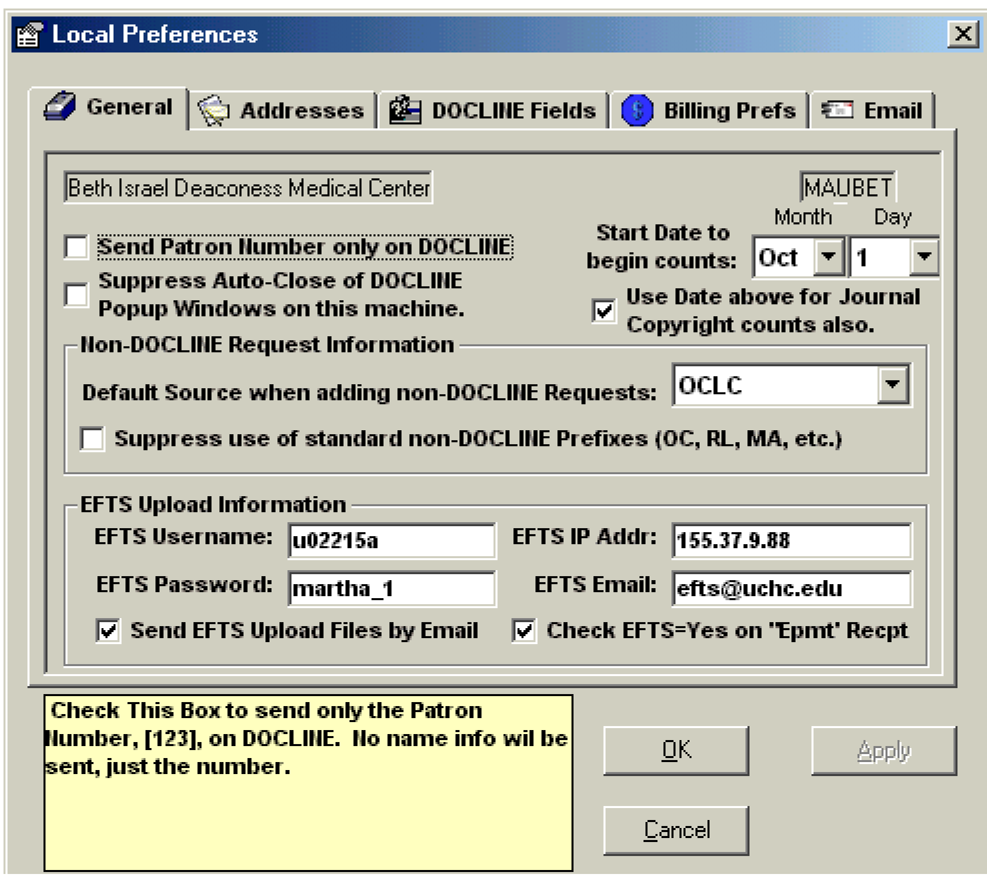
The new Local Preferences Form replaces the old **Billing Setup Form** (and adds many other features) in version 2.1.2. It has five Tabs: **General**, **Addresses**, **DOCLINE Fields**, **Billing Prefs** and **Email**.

The **Set Local Preferences** form is available under **Setup** on the **Menu Bar**.



General Tab Local Preferences

The **General Tab** of the Local Preferences form includes various DOCLINE, **EFTS** and other local choices, and appears as follows:



Send Patron Number only on DOCLINE. Matches the current use in QDPortal but will keep the information in the database rather than as a Registry entry.

Suppress Auto-close of DOCLINE Popup Windows on this machine. This will continue to be a Registry entry, since it is machine-specific, but is moved here in anticipation of the integration of QuickDOC and QDPortal.

Start Date to begin counts. Enter the Month and Day on which your most important counting year (usually either Fiscal Year or Calendar Year, although both of these may be the same) begins. In general, this is the date on which you want your annual default counting to begin. While most reports allow you to set the period before the report is printed, some automatic reports use a default for Start Date in reporting (or displaying). This date becomes your **Fiscal Year Start Date**. In almost all cases the Start Day will be 1, but you may set this to sometime later in the month, if you wish to. If you do, this probably won't make much difference, since reports normally revert to the beginning of a month in any case. Most entries will be either Jan 1 or Jul 1 or Oct 1, and will have some effect on a number of reports and displays

Default Start Date Counting in QuickDOC determines the start date for calculations of charges, using either Library Charge Profiles or Local Charge Profiles in the following categories:

1. **Free items for Patrons** this year
2. **Free items for Departments** this year
3. **Free items for Libraries** this year

On the **Borrow Item and Lend Item backfile screens**, each time you load those Grids, the backfile of items displayed is limited by Date using the following criteria:

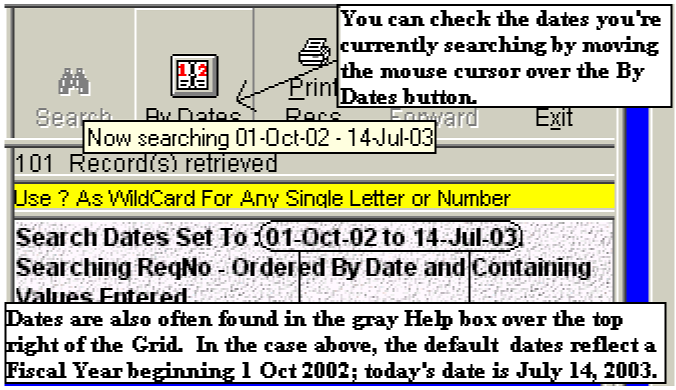
1. If the Fiscal Year Start Date is equal to Jan 1st then the **Grid's default begin date** is either:
    a. **If today's date is before June 30th**: the display would begin at the first day of the month 180 days ago, e.g., on June 23rd the grid would start the display with December 1st of the previous year or,

    b. **If today's date is July 1st or later**: the display would begin at the beginning of the current year, January 1.

2. If the the Fiscal Year Start Date is later than January, then the **Grid's default begin date** is either:
    a. **If today's date is later than the Fiscal Year Start Date**: the display will begin at the beginning of the current year, January 1 (e.g., if the FY Start Date is Oct 1, and today's date is November 23rd, the display would begin at 1 January of the current year).or,

    b. **If today's date is earlier in the year than the Fiscal Year Start Date**: the display will begin at the Fiscal Year Start Date in the last calendar year (e.g., if the FY Start Date is Oct 1, and today's date is June 23rd, the display would begin at 1 October of the previous year).

    Here is what the Default Grid Dates would look like if the Fiscal Year begins on October 1 and today's date is July 14 of the following year:



Default Start Date Counting for Quick Journal Reports will default to the beginning of the current calendar year, but see the Journal Copyright counts checkbox below for a method of changing this behavior.

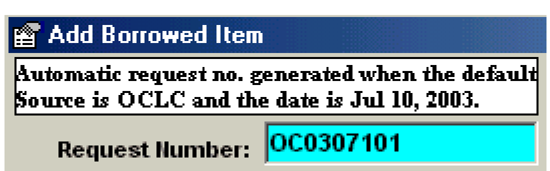
Default Start Date and End Date Counting for Most Reports is always the first day and last day of the previous month. If you change this for one report, your new dates will stay in effect until you exit the reports form. When you return, the previous month's default dates will be the default once again.

Use Date above for Journal Copyright counts also. This checkbox, if checked, will cause **Quick Journal Reports** (which generate a quick one-page report of the number of times a journal title has been borrowed or loaned, and is available on both Borrow and Lend Grids by clicking into the Title column, at which point a Print Quick Jrnl Report button will appear on the upper right of the Grid) and **Rule of 5 CONTU Guidelines** counting to begin at the beginning of the Fiscal Year, rather than the normal January 1st Start Date.

In most cases you will want to hold to the January 1st start date even if your Fiscal Year is different, because the copyright reporting requirements for U.S. Libraries seems to insist on a calendar year interpretation, but non-U.S. libraries and others with different requirements might want to measure their journal usage on a fiscal year basis.

Default Source when adding non-DOCLINE Requests. This will be the default in the Source box on both the Add Borrow and Add Lend forms when those forms are first loaded (the current default is DOCLINE, which remains available as a choice if needed). Thereafter, the default will be the setting from the previous entry.

Unless you turn off the automatic prefixing (see below), QuickDOC will also generate the rest of a **unique non-DOCLINE Request Number** by using Today's Date and the number of items added today. When you first bring up the Add Borrow Item form, the program checks in tblLocals of the QuickDOC.MDB database to ascertain the default source and the number of items added already on this date. If your default Source is OCLC, and Today's Date is July 10, 2003, and this is your first non-DOCLINE addition of the day, the Request Number will appear automatically, as follows:



Each time you change the Source in the Source combo box, QuickDOC reformats the request number. You can override this automatic format, but be aware that, if you do so and then change the Source before filing the request, the program will reformat the request number back to its typical design.

Standard non-DOCLINE Prefixes. QuickDOC will automatically prefix non-DOCLINE requests entered in the Add Borrow or Add Lend Item forms with a set of standard prefixes. These are to ensure that non-DOCLINE items are automatically prevented from using a future DOCLINE Request Number. They will also permit easy display of all items in one category by using the **Beginning With** limit on the Request Number search to display all items beginning MA (all Mail requests), etc.

Standard prefixes used are as follows:

COPY	-	Copy Service
EM	-	Email
FA	-	Fax
MA	-	Mail
OC	-	OCLC
OT	-	Other
RL	-	RLIN
TE	-	Telephone

Suppress use of standard non-DOCLINE Prefixes. 2.1.2 will automatically prefix non-DOCLINE added items with letters to indicate the source (e.g., **OC** = **OCLC**, **RL** = **RLIN**, **COPY** = **Copy Service**, etc.). This is to ensure that no made-up Request Number is in danger of duplicating a real DOCLINE number. If there is already a plan in place locally to do this, you can check the box to use your own prefixes rather than the built-in versions. Suppressing this behavior also suppresses the automatic use of today's date and unique number, so you're on your own to create a number (making sure it's unique and also not likely to be used by DOCLINE) for that request.

EFTS Username. Your ID in the EFTS system.

EFTS Password. Your Password in the EFTS system; necessary only for FTP transfers. [The FTP option may not be there in the future.]

EFTS IP Address. The IP Address of the EFTS system, for use in **FTP** transfers. [The FTP option may not be there in the future.]

EFTS Email. The Email Address of the EFTS system, for use in transfers using email attachments. [This will probably be the default transfer method in the future].

Send EFTS Upload Files by Email. Check this box to specify email transfers. This is to prepare for some more automated sending procedure in the future.

Check EFTS=Yes on 'Epayment' Receipt. Check this box to AutoUpdate Libraries to **EFTS = Yes** whenever **Epayment** appears at top of any Receipt from that Library. This will change automatically a Library's **EFTS Payment Supported** value from No to Yes whenever a Receipt is imported from that Library with the Epayment notation at the top. The rationale here is that this will be a time-saver for newly-joining EFTS members: once they have checked their own EFTS Payment Supported checkbox, they will then have other EFTS members in effect update themselves during their next Receipt.

This caused problems, however, for a few Libraries who had special Billing arrangements with other libraries that were also EFTS members. These records kept being changed back to **EFTS = Yes** when they wanted it kept at **EFTS = No**.

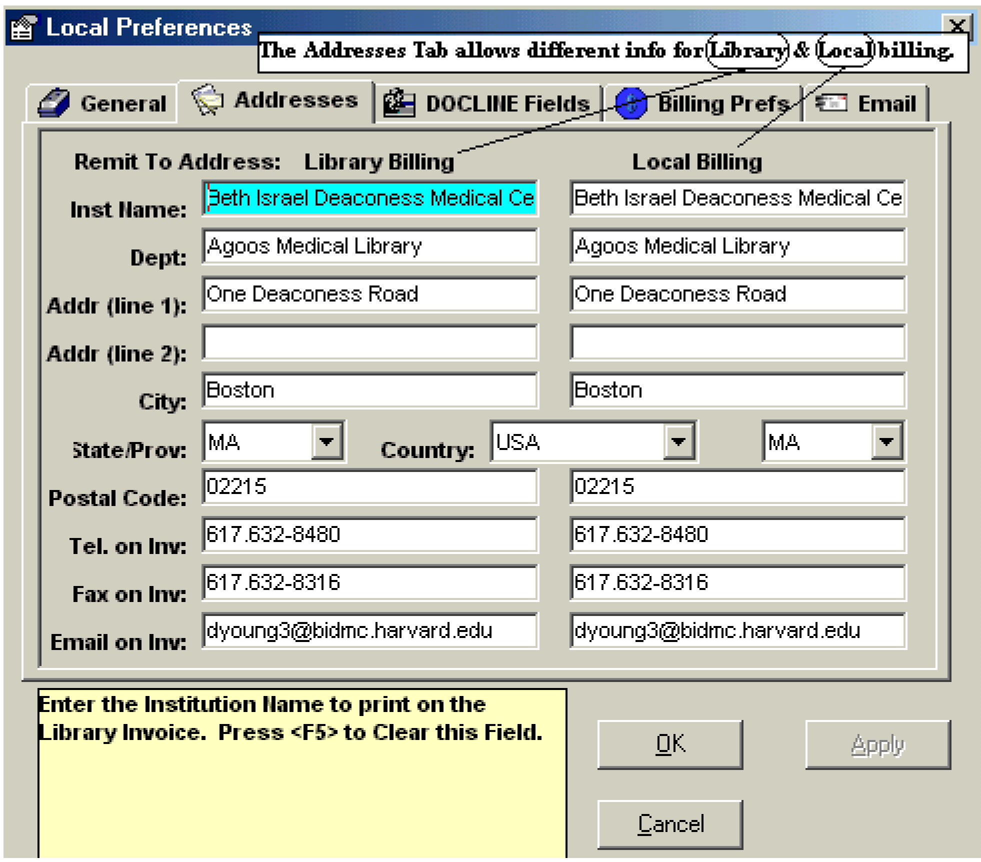
Unchecking this checkbox will, for future Receipts, **suppress that EFTS check for Library records on Receipt of a request marked Epayment**. Only **newly-created Library records** will automatically record the Library as EFTS = Yes if the first Receipt from that Library is an Epayment.

Most libraries will want to check this box. (You also get a chance to reset this value whenever you change your own Library's record to EFTS Payment Supported = Yes, but most will find it more convenient to set the value here.) Checking this box doesn't affect the EFTS Payment Supported value in your own Library's record, so don't forget to make sure that your own Library's record also has its **EFTS Payment Supported** checkbox is checked.

Addresses Tab Local Preferences

The **Addresses Tab** of the Local Preferences form adds the ability to set different **Remit To Address** values for Library and Local Billing, as well as other information that will appear on Invoices.

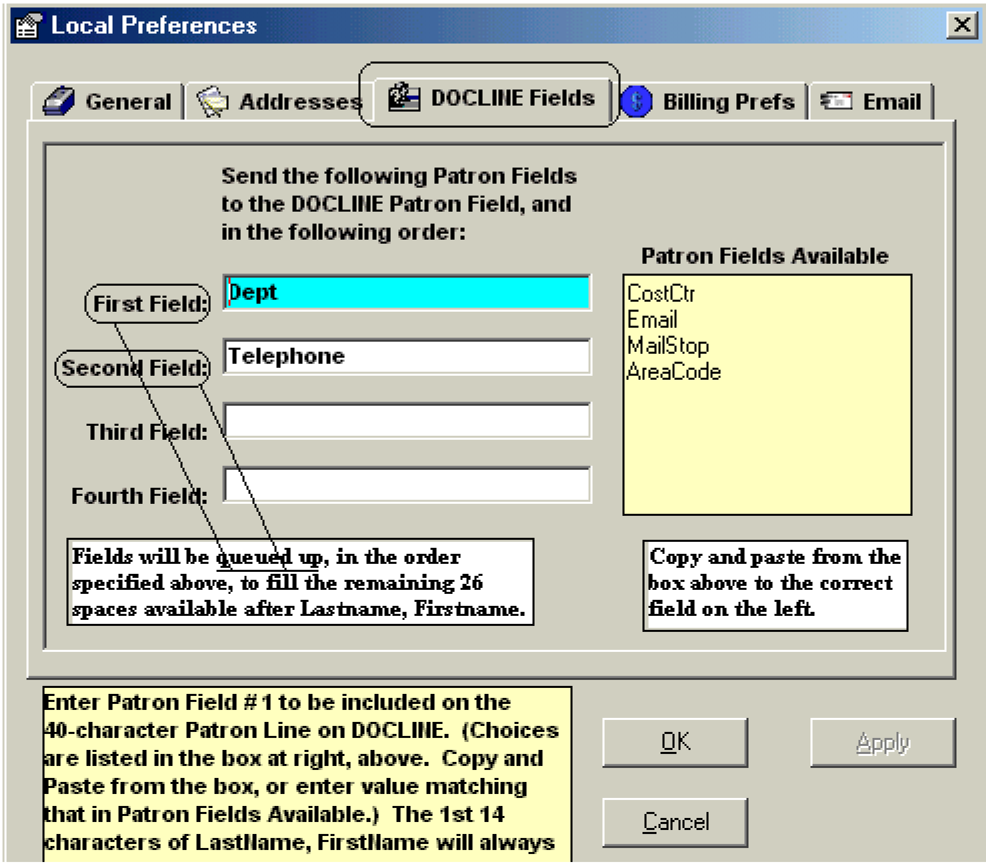
The Addresses Tab appears as follows:



In most cases these will be the same, but the option is there to change them if they are not. Either, or both, of these **Billing Return Address** values may be different from the official **Library address**, since these will be the locations to which checks will be mailed and correspondence regarding billing directed, which may be a Billing Office rather than the Document Delivery Department of the Library.

DOCLINE Fields Tab Local Preferences

The **DOCLINE Fields Tab** of the Local Preferences form adds the ability to specify which **fields of the Patron Record you want to send to DOCLINE** (in the 40 spaces of the **DOCLINE Patron field** that are available) and in what order you want to send them. It appears as follows:



Copy and paste fields from the yellow box on the right to the appropriate field on the left.

Patron Name Field in DOCLINE

DOCLINE allows a maximum of 40 characters in the Patron Name field:

If we try to send a Patron Name string longer than 40 characters, DOCLINE will truncate the string at the fortieth character, which would be a real problem in QuickDOC, since the import process uses the Patron Number (always in brackets at the end of the Patron Name, as in the [6], above) to do the lookup in the Patrons Table. If part of this number is lost, confusion reigns. If you ever need to edit what is automatically sent to the Patron field on DOCLINE, remember to leave the space+[Patron#] unchanged at the end of the line.

Consequently, when creating the patrons list that shows in the upper right corner of the screen on DOCLINE, QuickDOC is careful to limit the size of the string, including the bracketed Patron Number, to a maximum of 40 characters. It uses the following conventions:

1. **Patron Name**. The Patron Name is set out, using the Last, First format, but is truncated at 14 characters if the **Last, First format** is longer than 14 characters. This should provide enough information, in most cases, to identify the correct Patron. In cases where the first 14 characters of two patrons are the same, then additional information, such as Dept., should be determinative.

This reduces the space available in the field to 26 characters. Since there is always a space added after the Patron Name, the reality is that 25 characters remain free.

2. **Patron Number**. The program next checks the Patron Number and, based on the number of digits in the number (e.g., 1 for Patron Number 6, 2 for Patron Number 20, etc.), it sets aside a sufficient number of spaces at the end of the string to include the number plus the surrounding brackets. This will be anywhere from 3 to 7 additional spaces, although most often this number will be either 5 or 6. Our number of free spaces is now reduced to 19 or 20.

3. **Department**. Most libraries will want to include Department in the line as well, for identification purposes. QuickDOC automatically **truncates the Dept Abbreviation at 4 characters**, to save space on the line, so keep this in mind when creating abbreviations for Departments. Including the space at the end of the four-character Department Abbreviation, we are now left with **only 14 or 15 spaces that are truly available for optional fields** such as **Telephone**, **Email Address**, **Mail Stop** and **Cost Center**. Obviously, getting more than one of these options into that small footprint will be difficult. Any value that prings us over the 40 character limit will be truncated to allow a space plus the Patron Number to fit in at the end.

Some suggestions for utilizing these 14-15 optional spaces are discussed in Optional Patron Name Fields, below. In general, use the following criteria for deciding on which fields to add to the DOCLINE Patron Name field:

1. **Identify the correct Patron quickly on the QDPortal Patrons List**. Since the list will be used on DOCLINE to send the proper Patron info into the **DOCLINE Patron Name field**, putting the Department value in the first position after the Patron Name will immediately identify **Jones, Joe CARD** from **Jones, Joe MED** and will reduce the chance of error. Since Department is always truncated at four characters plus a space, this field has a minimal impact on the free characters available. Nevertheless, if you know all your patrons personally, or can infer the Department from one of the optional fields you would prefer to include, then you can re-direct these five characters to that field by leaving the Dept field out.

2. **Show Contact Info on Borrow Printout and Receipt Cover Sheet**. Since the Full Display printout of the Borrow transaction, and the cover sheet included by the Lender from its Receipt printout, will both include the full Patron Name line, that information is instantly available when items are received from the Lender. Including your usual Contact info on the Patron Name line can make it easy to pick up the phone and call the Patron (if you include Telephone), or send a boilerplate email notification (if you include Email), or pop the printout of the article into an inter-office envelope (if you include MailStop), the moment the item arrives in the library. It's an efficient way to speed the document to the end user.

   On the other hand, don't forget that all this information travels along with the request to any potential lender along the DOCLINE Routing Table route. While this isn't patient information, and doesn't have the same level of sensitivity, the phone numbers and email addresses will be out there, although some of the features discussed in Optional fields, below, can limit the actual disclosure of complete phone numbers and addresses. Also, keep in mind that, if you've checked the **Send Patron Number Only on DOCLINE** checkbox in the General Tab, then none of this will be sent, no matter which fields you select here. Only the bracketed Patron Number will appear in the Patron Name field on DOCLINE.

Optional Patron Name Fields

In addition to the Last, First, Dept and Patron Number fields discussed above, there are five other choices that can be included. Because of the small number of available spaces for these optional fields, it will rarely be possible to add more than two, and you can usually only count on one of these to be displayed fully in all cases (given the 14-15 limit when Patron Names and Patron Numbers use their maximum number of characters). Here are some things to keep in mind when choosing which of these to add:

1. **Email**. Plans are to include an **automatic Patron notification by email** in the next update, so anyone who needs this information for Patron Contact can probably use that method after the next update. Meantime, to save space, any Patron whose email domain is the same as that of the Library will appear with the email domain suppressed. E.g., if your library's email address is mylibrary@myuniversity.edu and the Patron's email address is jjones@myuniversity.edu then the address will appear in the Patron Name field as jjones@, with no further information. Addresses that don't match yours will appear in full, however, and some of these may be fairly long, so the chances of truncation are greater here than in most of the optional choices.

2. **AreaCode**. If all (or 99%) of your Patrons are in the same area code, then there's no need to include this field in the Patron Name field. Unfortunately, because of the recent multiplicity of area codes in some areas, you may already have many Patrons, particularly Loansome Doc Patrons, with area codes different from your own. The following conventions apply to area codes included in the Patron Name field:

    a. Area codes are displayed in 3 digits and a hyphen (**123-**);

    b. If the area code matches the Library's area code then it is omitted (no hyphen, either);

    c. While it might appear that b., above, might give you permission to include area code even when you have only a few outsiders, keep in mind that **this computation also increases processing time** for producing the Patrons List and libraries with large numbers of Patrons might experience a perceptible delay while the list is being created.

2. **Telephone**. The number used is the **Voice Number field** on the **Comms Tab** of your Library record. As with area code, if the first four digits of the Patron's telephone are equal to your Library's first four digits (i.e., the same exchange, as in 123-), they are replaced by an **x**. As in the following cases, where your Library voice number is 123-4567:

    a. If the **Patron's Voice Number** is 123-5678, it will appear as **x5678** on the Patron List;

    b. If you commonly **abbreviate the Library phone number** to 23-4567 or 3-4567, or 123.4567, or 23.4567, or 3.4567 in the Library Voice Number field, as long as you also abbreviate the Patron's Voice Number in similar fashion, then QuickDOC will send x5678 to the Patron List; but if you use different formats at different times then results will surely be inconsistent.

    c. If you want to use your own **local telephone number format** for **Patron Telephone numbers** (e.g., **LOCAL5678** or **X5678** instead of the usual 123-5678), then **DON'T** use the 123- format that your Library record uses when entering Patron Voice Numbers. Since the beginning of each Patron telephone in those cases will never match the 123- of the Library phone, then QuickDOC will **never** find a match and will transfer the complete **LOCAL5678** (or **X5678** or whatever) entry to the Patron List.

    d. One way to tell the difference between an **X5678** and an **x5678** where the **x** has been substituted for the Library Exchange 123- is that the **Library Exchange abbreviation always** has a lower case **x**, while an **X** entered into the **Voice Number field** will always be upper case.

    e. The **best choice** (easiest to remember) is to use a typical 123-5678 format when you enter your Library's Voice Number, and then to use the same format for Patrons. This will send the minimal x5678 as the Telephone part of the Patron List line.

3. **MailStop**. When adding this field in the Patron record, be sure to use abbreviations whenever possible. In fact, brevity is a good thing to keep in mind whenever adding information that might

later be included in the Patron Name line on DOCLINE (exceptions are those fields where QuickDOC automatically matches the Patron value against the Library value, such as area code, telephone, and email, where care should be taken to use the complete value, so that matches will be accurate).

4. **CostCtr**. Since the Import process will always retrieve the **Primary Cost Center associated with that Patron record** and add it automatically to the item that is being imported, I'm not sure what is gained by including it here, except in cases where the Cost Center provides an identification link for a Patron record, in the manner described for Dept values, above. Another possibility might be where Patrons typically have more than one Cost Center attached, and the Patron field can be used to provide a visual clue as to which of them will be automatically added, so that items where a different Cost Center should be used can be edited after import.

Here's how a **Patron's List** might Look with only Last, First (total of 14 +1), Department and Email Addr. You can see that, even with this small group of fields, the email field may be cut off well before completion:

```
Bergman, Mark HEMO [934]
Berman, Cynthi PSYC [268]                 | ← 40 char's
Berrada, Driss GAST dberrada@eart [1056]
Berson, Alma SOCW [273]
Bitton, Alain GAST [765]
Blackburn, Geo SURG gblackbu@ [1062]
Blank, Margot MED [278]
```

As you can see, the Berrada Patron, truncated to the first 14 Last, First of the Patron's Name (ending with Driss, abruptly), plus the space, plus the (4-digit) Department (+ space again), is truncated after the first four characters of earthlink.com; the final count for that row, including spaces, is 40. As long as eart is short for earthlink.com and no other, then this compression of the Patrons List will be fine. Only if the truncated email domains begin to resemble each other does this method of display begin to crumble as an identifying method.

Meantime, email addresses where the part after the @ (often called the email domain) matches the same part in the Library Contact Email Address will show only the email username (as in gblackbu, above) plus the @, with nothing after (e.g., gblackbu@, as shown above).

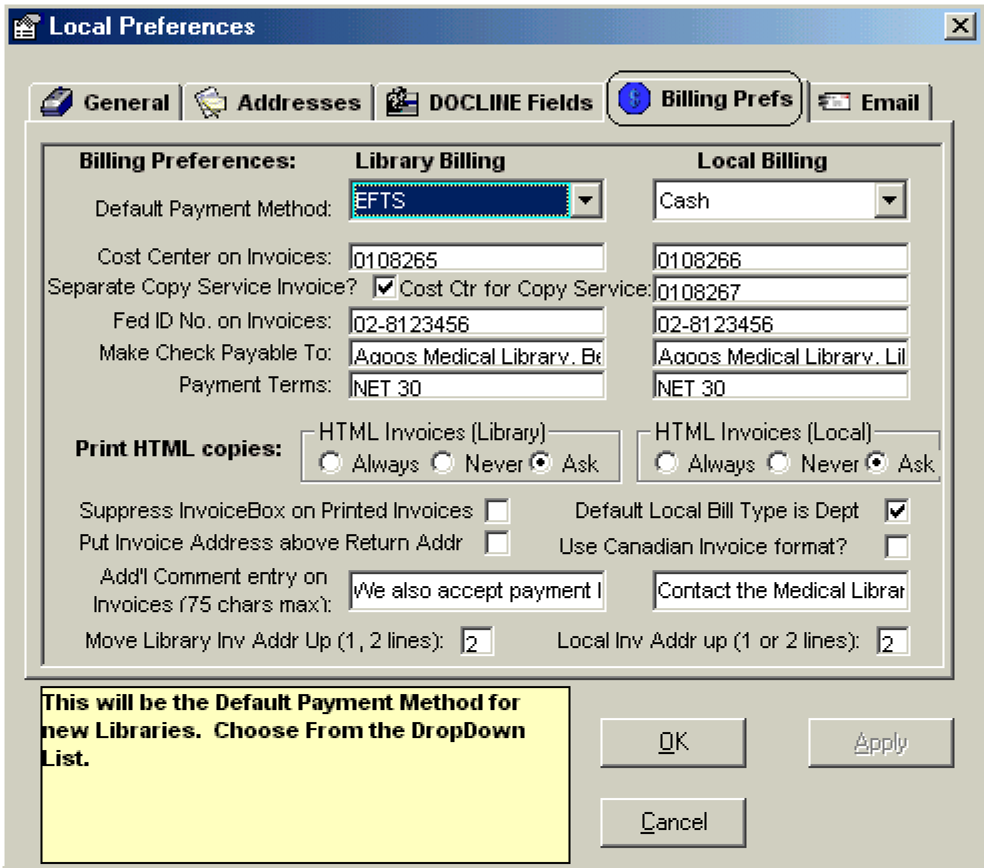
Here's the same list with just the **Name** and **Email** (no Department):

```
Berrada, Driss dberrada@earthlink [1056]
Berson, Alma [273]                        | ← 40 char's
Bitton, Alain [765]
Blackburn, Geo gblackbu@ [1062]
Blank, Margot [278]
```

Even with no Department, the full **earthlink.com** domain isn't available (more would be available in the DOCLINE Patron Name field if the actual Patron Name---Berrada, Driss---were shorter!) at the end of the Berrada name line on DOCLINE. On the other hand, George Blackburn's email domain, which is the same as our Library's, is easily retrievable from gblackbu@ (where the Email in the Patron List always omits the part after @ if it matches the real Local Library's email domain)with the default Library email domain assumed).

Billing Prefs Tab Local Preferences

The **Billing Prefs Tab** of the Local Preferences form adds the ability to set different values for various items relating to **Library and Local Invoices**, and will appear as follows:



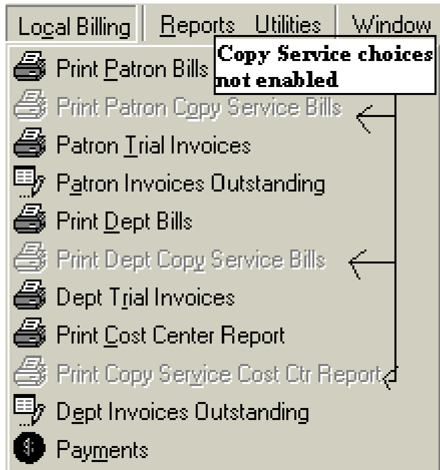
Default Payment Method. Can be different for Library and Local. These are the values that are assigned when new Libraries, Patrons and Departments are created.

Cost Center on Invoices. This is the **Our Cost Center** value that appears with the return address at the top of an Invoice. Can be different for Library and Local. Can also be different for **Copy Services Invoices**; see below.

Separate Copy Service Invoice? In most cases you will want to have this box **unchecked**, so that Local Invoices will include both Copy Service and ILL charges in the same invoice.

If you leave this box unchecked, which means that Copy Service items will always be included with ILL items in Local Invoices, then the **Cost Ctr for Copy Service** value will never be needed; nevertheless, it's probably wise to enter a default Cost Center for your Library's local payments here anyway, if you have one, in preparation for a time when you might want to check the box in order to print a **Copy Service Invoice** for a particular Patron, Department or Cost Center. In most cases this value will be the same as the Local Billing Cost Center, but it's added here so that, in cases where there is a separate Cost Center assigned for **income derived from Copy Service** activities, you can enter that value for printing only on Copy Service Invoices. This is the **Our Cost Center** value that will be printed at the top of any Copy Service Invoice, whether Patron, Department or Cost Center.

If this box is unchecked, the choices on the **Menu Bar** under **Local Billing** for all three separate Copy Service Invoices/Reports will be disabled:



There will also be no Message Box question when printing a single Invoice from the **Local Billing Grid** as to whether you want to print a **Copy Service** or regular ILL Invoice.

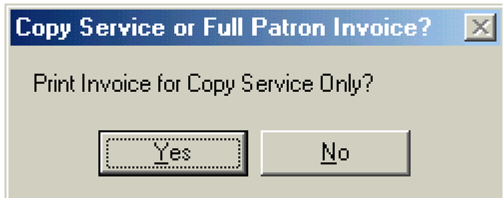
If you will normally print Copy Service Invoices (including Cost Center Reports/Invoices) separately, then check the **Separate Copy Service Invoice? Checkbox**; this will allow you to choose whether or not to include a separate Copy Service Invoice for each Patron/Dept/Cost Center each time you run invoices:

If this box is checked, you can decide for each invoice print whether or not to include Copy Service. Choices under **Local Billing on the Menu Bar** for **Print Patron Copy Service Bills**, **Print Dept Copy Service Bills**, and **Print Copy Service Cost Ctr Report** will also be enabled.

If the **Separate Copy Service Invoice?** checkbox is checked, you will also want to be sure that the **Cost Ctr for Copy Service** box includes some value, otherwise the Copy Service Invoices will have nothing in the Cost Center field for Patrons or Departments to remit to.

When you check this box, you are set up to first run **separate Copy Service Invoices** before running the normal Local Patron/Dept/Cost Center Invoice run. (Items already invoiced in Copy Service Invoices won't be eligible for any later Invoice run, because their Local Status will already be **InvDep**.) The default here is unchecked, which means that Copy Service items will be included in the same Invoice with ILL items.

If you specify the **Separate Copy Service Invoices?** Choice, in addition to the extra choices on the Local Billing Menu Bar entry, you'll also see a "**Print Invoice for Copy Service Only?**" Message Box in the **Local Billing Grid** when you choose to generate a Patron/Dept Local Invoice (assuming that the list of items to be invoiced includes at least one Copy Service item):



In any event, when the group of requests you have gathered to print via the Local Billing Grid **One Invoice Print** has no Copy Service items, you won't see this message box and the resulting invoice will include only regular ILL items.

Cost Ctr for Copy Service. The **Cost Center for Copy Service** is the **Our Cost Center** value that appears with the return address at the top of a Copy Service Invoice. Can be different from both the Library and Local Cost Centers.

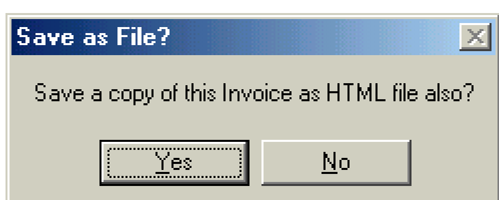
Fed ID No. on Invoices. Can be different for Library and Local (this value can be used for messages other than the Federal ID number). A maximum of 25 characters here.

Make Check Payable To. How should the payment check be made out? Can be different for Library and Local.

Payment Terms. Usually something like NET 30 (for 30 days to pay) or PAYABLE UPON RECEIPT (never happens, as far as I can tell). Can be different for Library and Local.

Print HTML copies. This controls whether or not HTML versions of Invoices are generated when a printed copy is made. Check **Never** if you never send these HTML Invoice; check **Ask** if you want to see a popup message box each time; and check **Always** if you want to have an HTML Invoice automatically generated without asking permission.

If you check **Ask**, you will see the "**Also save each Invoice as an HTML file**" checkbox on the Print Invoices menu, but it will be unchecked, so that you'll need to check it for each batch run of Invoices. Ask will also cause the display of the following message box when printing a single Invoice from either the Local or Library Billing Grids:

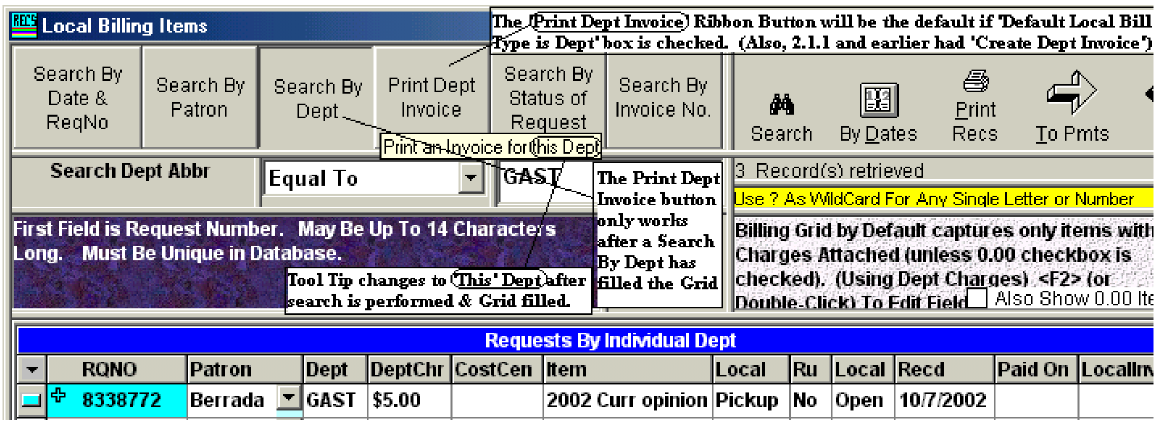


If you check **Never**, neither the above message box nor the checkbox on the Print Invoices form will appear. Checking **Always** will skip the message box (you're saying that you will always have clicked Yes if the box were shown), but will still display the checkbox on the Print Invoices form, although the default there will be checked, so that you'll have to uncheck it if you want to forego the HTML invoice print.

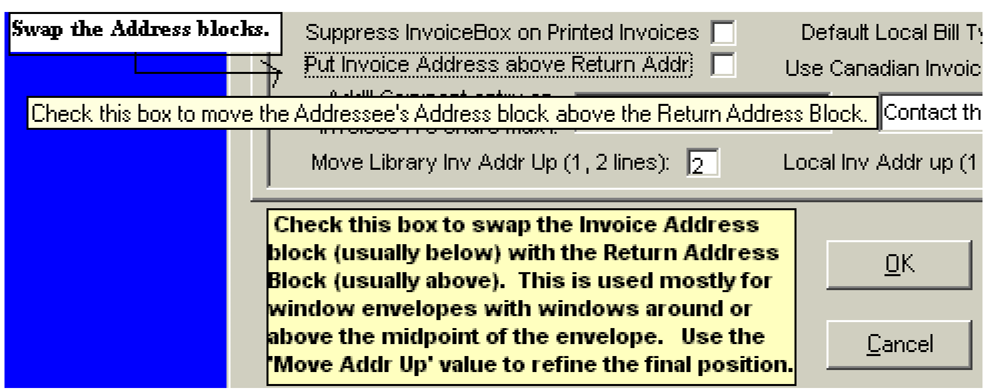
Suppress Invoice Box on Printed Invoices. This comes over from the old Billing Setup form and should be checked if your printer doesn't print a return address on Invoices but leaves a blank box instead.

Default Local Bill Type is Dept. This checkbox allows you to specify that your normal method of Local Billing is by Department (including Cost Center Invoices), rather than by Patron (which is the normal default). If you check this box then the Local Billing Grid will always come up with the ChrgAsDept column showing, and the default payments will also be PaidDp. The default Invoice will also be the Dept Invoice, although you can always print Patron Invoices by choosing the Patron Search first in the Local Billing Grid.

The Local Invoice Ribbon Button caption has also changed from Create Dept Invoice (or Create Patron Invoice) to Print Dept Invoice (or Print Patron Invoice), since that is exactly what it does; there is no pause between the clicking of that ribbon button and the printing of the Invoice (unlike the situation for Library Invoices, where there is a pause, and which requires another button click to actually print the Invoice). The new look for the Print Dept Invoice is:

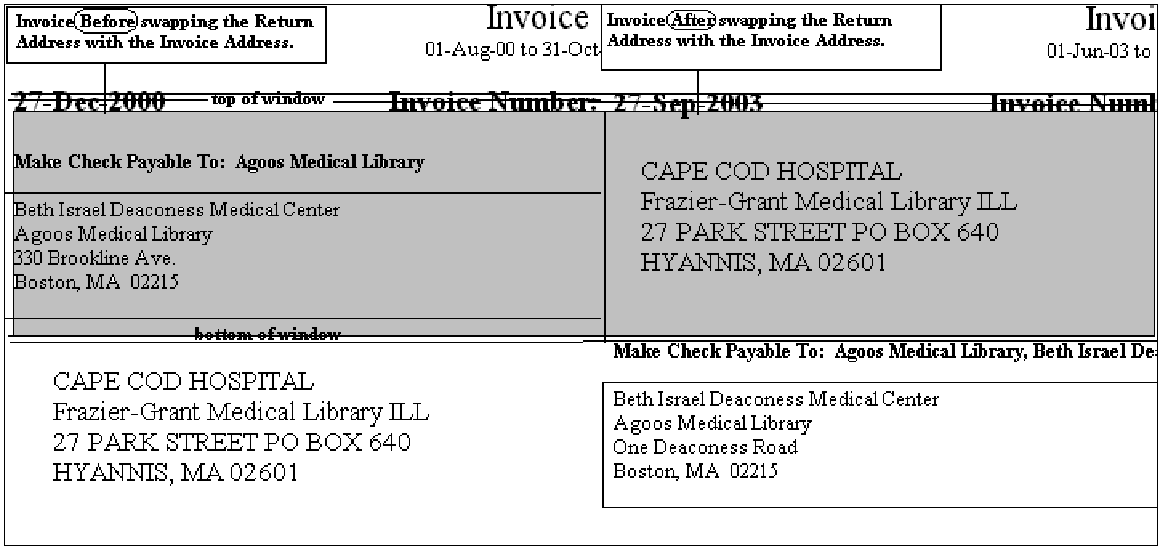


Put Invoice Address above Return Addr. This checkbox will swap the normal structure of printed Invoices, where the Return Address appears in a box at the top, and the Address of the Library or Patron being billed just underneath that block. The main use for this option is for Libraries whose window envelopes have a window toward the middle of the envelope (rather than the usual lower left) or above.



As in many of the checkboxes in QuickDOC, if you hold the cursor over the 'Put Invoice Address' area you will see a brief Help comment (**ToolTip Help**), whether or not you are actually at that part of the form. The yellow help box below will always show help, but only with regard to the current item on the form.

The effect of checking this checkbox is the **swap the Invoice Address Locations**: Invoice Address at the top, Return Address below it, as illustrated in the Before and After graphic below:



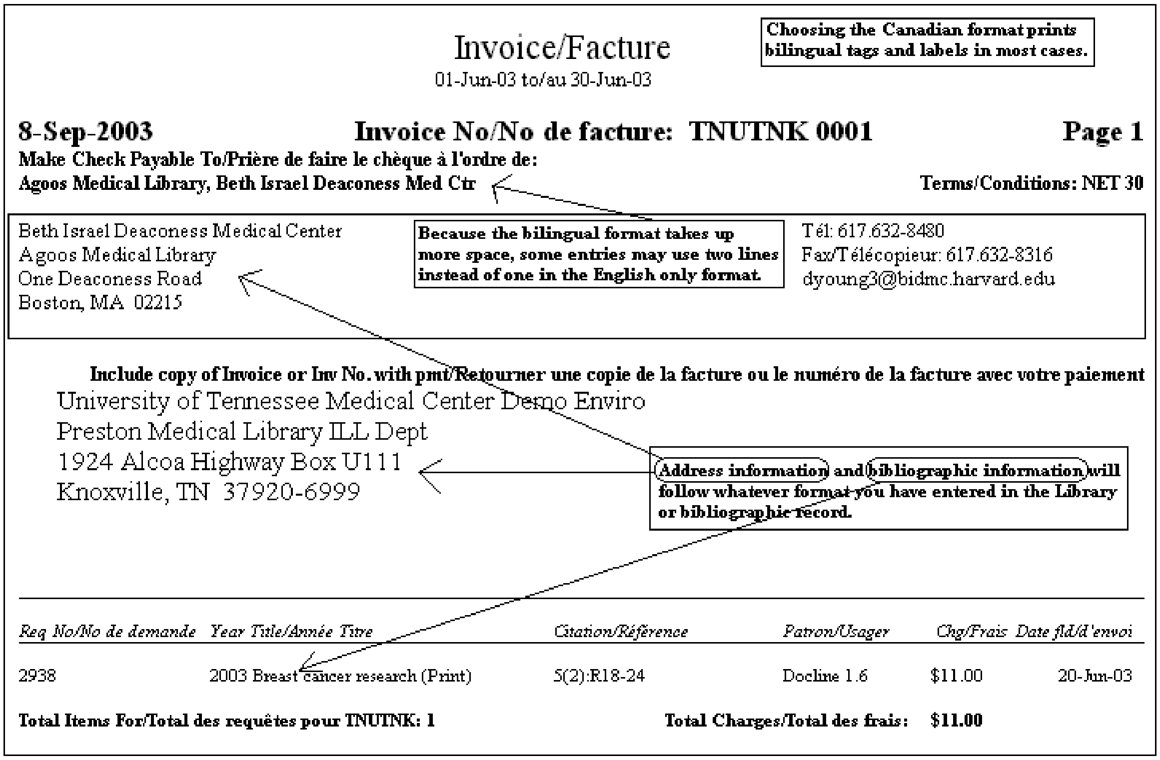
In addition to this big switch, you can also fine-tune the location of the Address Block by using the Move Invoice Address Up values (see below), if necessary, but because the **Include copy of Invoice or Inv No.** line is already below the Invoice Address after the swap, you really have only the 1 line up choice (rather than 2).

Use Canadian Invoice format? Will use Bilingual (French/English) headers and labels on the Invoice sent to both Libraries and Local users. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Library record and in the Addresses Tab, above, but bilingual labels will be displayed on the printout wherever possible.

Because the bilingual labels will obviously take up more space than English only labels, there will be slight changes in the Invoice format: some labels, like the **Make Check Payable To** label, will show on two lines instead of one. In order to retain the general structure of the Invoice Header, in most cases, including that of the Make Check line, the label is moved up into what was a blank line and the contents of the field are displayed below.

Even with these changes, if you're using bilingual labels, you should try to keep the entries for **Make Check Payable To**/**Prière de faire le chèque à l'ordre de** and **Terms**/**Conditions** as concise as possible, since space here is limited.

Here's an example of the Library Invoice with Use Canadian Invoice format checked:



Invoice/Facture

01-Jun-03 to/au 30-Jun-03

Choosing the Canadian format prints bilingual tags and labels in most cases.

8-Sep-2003 **Invoice No/No de facture: TNUTNK 0001** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr

Terms/Conditions: NET 30

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Because the bilingual format takes up more space, some entries may use two lines instead of one in the English only format.

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

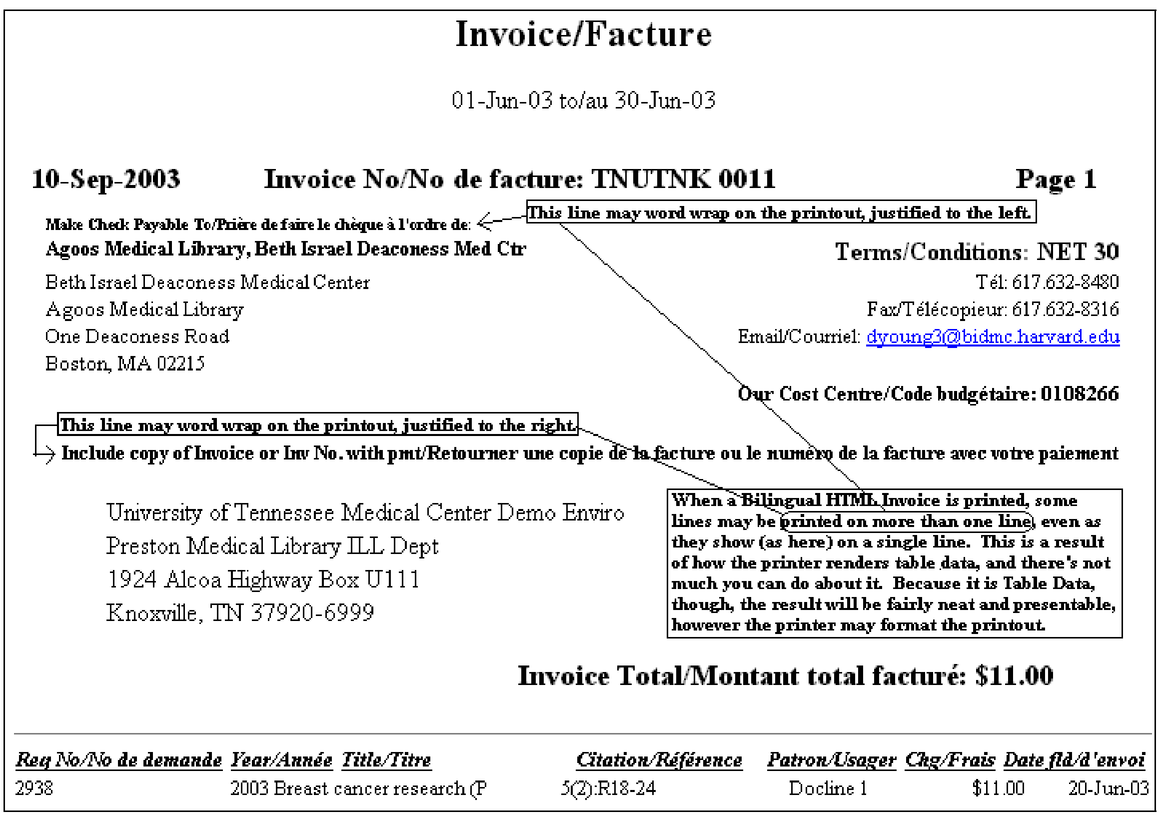
University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

Address information and bibliographic information will follow whatever format you have entered in the Library or bibliographic record.

Req No/No de demande	*Year Title/Année Titre*	*Citation/Référence*	*Patron/Usager*	*Chg/Frais*	*Date fld/d'envoi*
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03

Total Items For/Total des requêtes pour TNUTNK: 1 **Total Charges/Total des frais: $11.00**

Bilingual HTML Invoices are even more constricted in space, since some of the fonts used in the HTML format take up more space. Because HTML Invoices aren't mailed, though, the placement of the Address and Return Address isn't as critical as in a normal Invoice.



Invoice/Facture

01-Jun-03 to/au 30-Jun-03

10-Sep-2003 **Invoice No/No de facture: TNUTNK 0011** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:

This line may word wrap on the printout, justified to the left.

Agoos Medical Library, Beth Israel Deaconess Med Ctr

Terms/Conditions: NET 30

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
Email/Courriel: dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108266

This line may word wrap on the printout, justified to the right.

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

When a Bilingual HTML Invoice is printed, some lines may be printed on more than one line, even as they show (as here) on a single line. This is a result of how the printer renders table data, and there's not much you can do about it. Because it is Table Data, though, the result will be fairly neat and presentable, however the printer may format the printout.

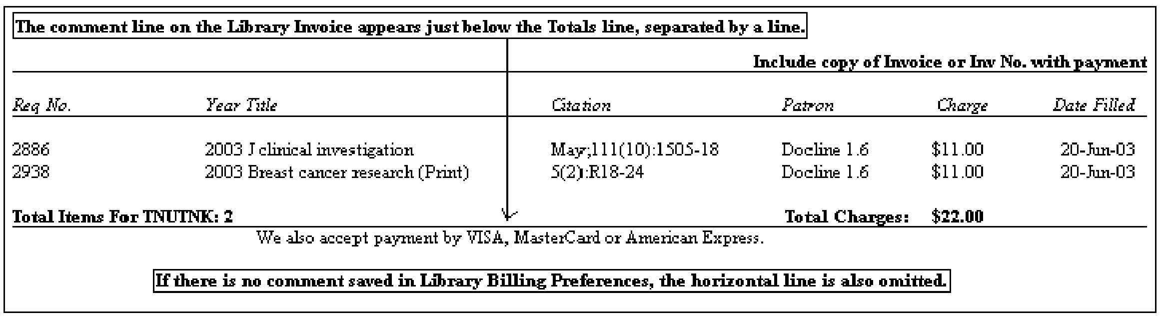
Invoice Total/Montant total facturé: $11.00

Req No/No de demande	***Year/Année***	***Title/Titre***	***Citation/Référence***	***Patron/Usager***	***Chg/Frais***	***Date fld/d'envoi***
2938	2003	Breast cancer research (P	5(2):R18-24	Docline 1	$11.00	20-Jun-03

Local Patron/Dept and Cost Centre Invoices have a similar format.

Add'l Comment entry on Invoices. Room to add a brief comment (up to 75 characters long) that will print at the bottom of the Library or Local invoice. Hold the cursor over this box to see the full entry as a Tool Tip; here's what shows when the cursor is placed over the Library Billing comment (left box) below:

Invoice comment lines appear at the end of Invoices, after the Totals line, with a horizontal line separating the comment from the Invoice section. Here's an example from a Library Invoice (Local Invoice Comments are displayed in exactly the same way):



The comment line on the Library Invoice appears just below the Totals line, separated by a line.

Include copy of Invoice or Inv No. with payment

Req No.	*Year Title*	*Citation*	*Patron*	*Charge*	*Date Filled*
2886	2003 J clinical investigation	May;111(10):1505-18	Docline 1.6	$11.00	20-Jun-03
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03
Total Items For TNUTNK: 2			**Total Charges:**	**$22.00**	

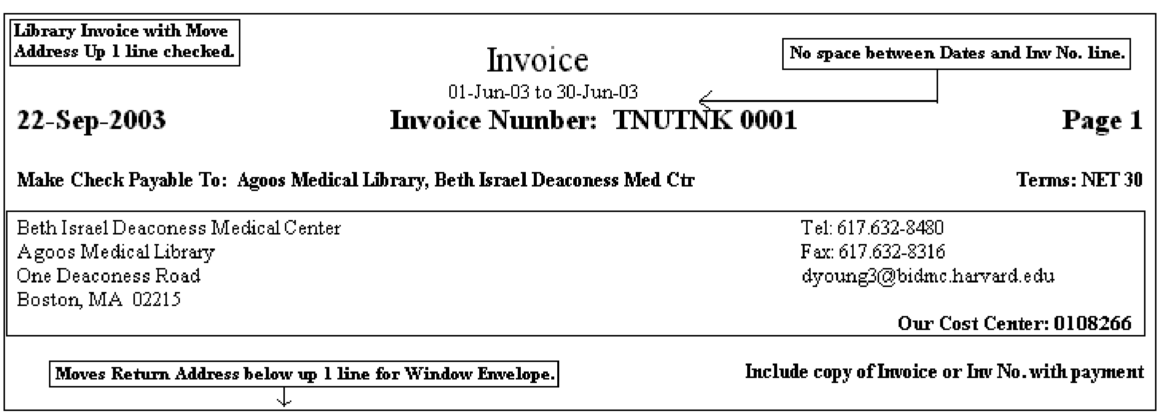
We also accept payment by VISA, MasterCard or American Express.

If there is no comment saved in Library Billing Preferences, the horizontal line is also omitted.

The comment will be printed at the center of the page, just under the horizontal line. The limit of 75 characters is set to ensure that there will be enough room for a cleanly centered line (the comment above is 62 characters long), no matter how many uppercase or other wide characters are used. If there is no Additional Comment Line, the horizontal line will not be printed.

Move Invoice Address Up (1, 2 lines). If your Invoice Address doesn't quite fit the window of your window envelopes, then use this small adjustment to bring the address lines up. Two lines is the maximum move, alas, so your entries here, for both Library and Local Invoices, should be either 0, 1 or 2 (they can be different for Library and Local, but will most often be the same, since they'll be using the same envelopes).

Move Invoice Address Up 1 line will move the **Bill To address** up one line from the default position. This is accomplished by eliminating the blank line between the Invoice Dates and the line with the Invoice Number in the middle. Both Library and Local Invoices with a 1 line move up will appear as follows:



Library Invoice with Move Address Up 1 line checked.

Invoice

No space between Dates and Inv No. line.

01-Jun-03 to 30-Jun-03

22-Sep-2003 **Invoice Number: TNUTNK 0001** **Page 1**

Make Check Payable To: Agoos Medical Library, Beth Israel Deaconess Med Ctr **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tel: 617.632-8480
Fax: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Center: 0108266

Moves Return Address below up 1 line for Window Envelope.

Include copy of Invoice or Inv No. with payment

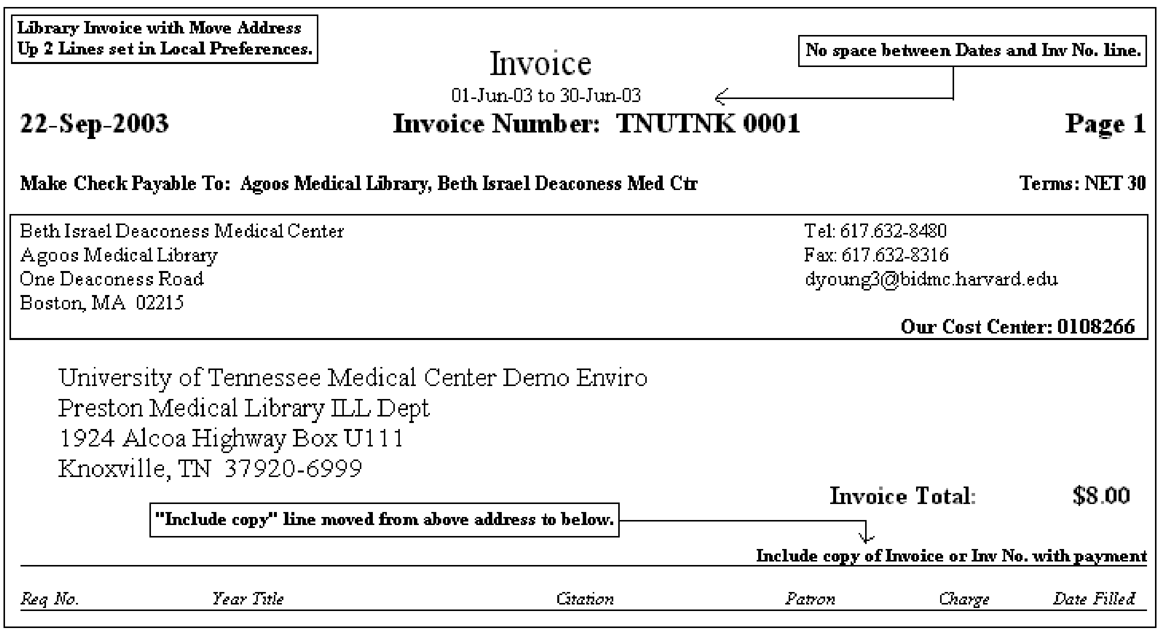
Move Up values are ignored for HTML Invoices, since these are delivered by email and won't need a window envelope.

Move Invoice Address Up 2 lines will move the **Bill To address** up two lines from the default position. This is accomplished by eliminating the blank line between the Invoice Dates and the line with the Invoice Number in the middle and also moving the **Include copy of Invoice or Inv No. with payment** line from just above the **Bill To address** to a line just below it and just above the line that separates the header from the column headers of the Invoice.

N.B., A two-line move up after the **Put Invoice Address above Return Addr** checkbox has been checked is the same as a one-line move, since the "Include Copy of Invoice" line is always beneath the Invoice Address line after the address blocks are switched.

For Library Invoices, where the **Our Cost Center** value may not be as important, you can also generate an easy move up of about a half a line by not including a Cost Center value for Library Invoices. Weigh this small move up against the necessity (or lack of it) that the payer should know your Cost Center when making payment and eliminate it if it's not necessary and you want that extra move up for the Bill To address.

A typical Invoice (Local or Library) with a 2 line move up will appear as follows, with both the removed lines indicated:


Library Invoice with Move Address Up 2 Lines set in Local Preferences.

No space between Dates and Inv No. line.

Invoice

01-Jun-03 to 30-Jun-03

22-Sep-2003 **Invoice Number: TNUTNK 0001** **Page 1**

Make Check Payable To: Agoos Medical Library, Beth Israel Deaconess Med Ctr **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tel: 617.632-8480
Fax: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Center: 0108266

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

Invoice Total: $8.00

"Include copy" line moved from above address to below.

Include copy of Invoice or Inv No. with payment

Req No.	*Year Title*	*Citation*	*Patron*	*Charge*	*Date Filled*

To see how a Canadian (bilingual) Library Invoice with a setting to move **Bill To address** up 2 lines might look (the Local Invoices are similar), here is an example:

Library Invoice (Canadian bilingual format) with Move Address Up 2 Lines set in Local Preferences.

Invoice/Facture

01-Jun-03 to/au 30-Jun-03

No space between Dates and Inv No. line.

22-Sep-2003 **Invoice No/No de facture: TNUTNK 0001** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108266

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

"Include copy" line moved from above address to below.

Invoice Total/Montant total facturé: $ 5.00

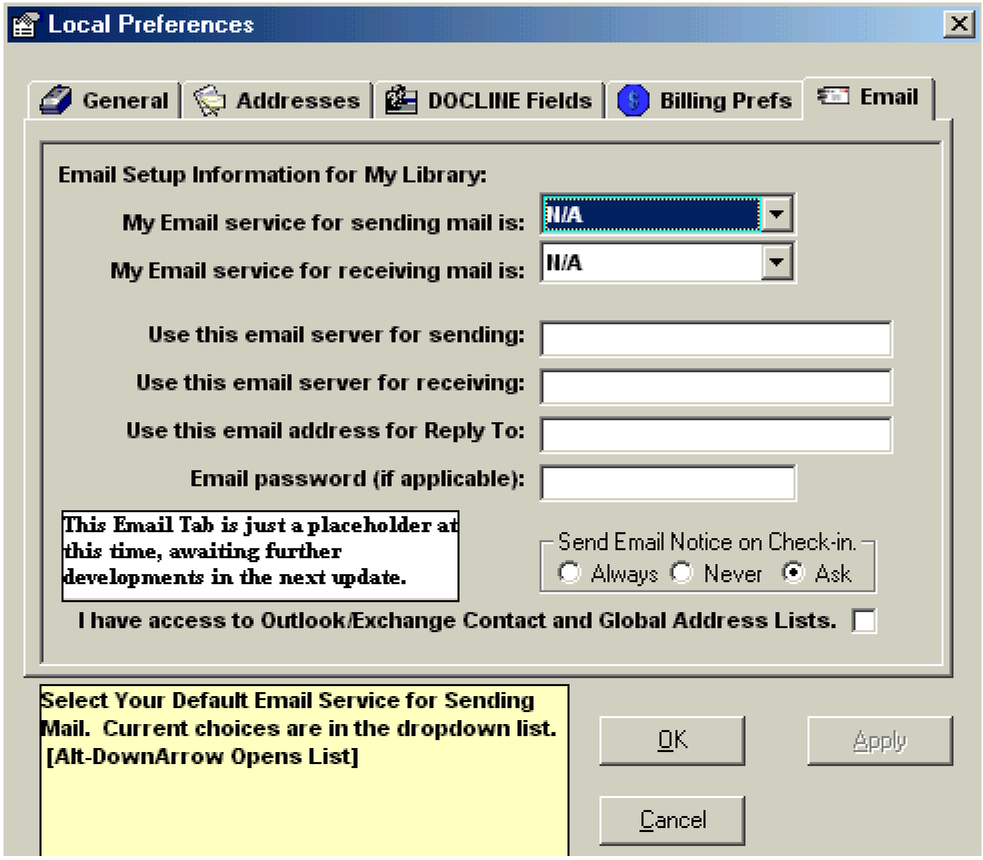
Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Req No/No de demande Year Title/Année Titre Citation/Référence Patron/Usager Chg/Frais Date fld/d'envoi

You can also use the settings on the Addresses Tab to change where the recipient's address appears in a window envelope. If you eliminate a line of the Return Address (by moving a second street address line up into the first line, perhaps), it's the same as moving the Library Invoice Address up one line. If you add a second street address line, it's the same as pushing the Library Address down one line. This technique is fairly limited, though, since most address lines (except for the second street address) will be used, even if empty, for phone, fax and email information.

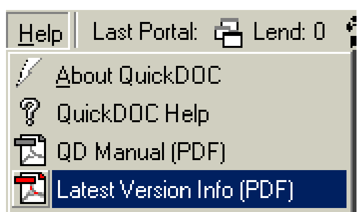
Email Tab Local Preferences

The **Email Tab** of the Local Preferences form is a placeholder for future additions to the program (after 2.1.2):



New Entries under Help on the Menu Bar

Two new entries have been added under **Help** on the **QuickDOC Menu Bar**:



QD Manual (PDF)

This choice allows access from within the program to the **complete QuickDOC Manual in PDF format**. Clicking this choice will launch **Adobe Acrobat Reader** (if you have the program present on that machine) and load the **QuickDOC.pdf file**.

Although the regular QuickDOC Help file (also available from the Help Menu) contains most of the same information in a **Windows Help format**, opening the PDF version of the Manual may be useful for printing a selection of pages, or for reading a section continuously, rather than in separate Help file screens.

If the QuickDOC.pdf file doesn't exist in your QuickDOC Program folder then this selection will be grayed out.

Latest Version Info (PDF)

This choice allows access from within the program to the "**What's New?**" file describing changes and additions in the latest program update (version 2.1.2 in this case). Clicking this choice will launch Adobe Acrobat Reader (if you have the program present on that machine) and load the **QDLatest.pdf file**.

It's always a good idea for each Library Staff member to use this choice upon first starting up QuickDOC after each update to get a general idea of what the latest changes, fixes and enhancements might be. Printing the entire document, or at least the sections of the document describing changes germane to your operation, is recommended as an aid to becoming familiar with the latest version.

If the QDLatest.pdf file doesn't exist in your QuickDOC Program folder then this selection will be grayed out.

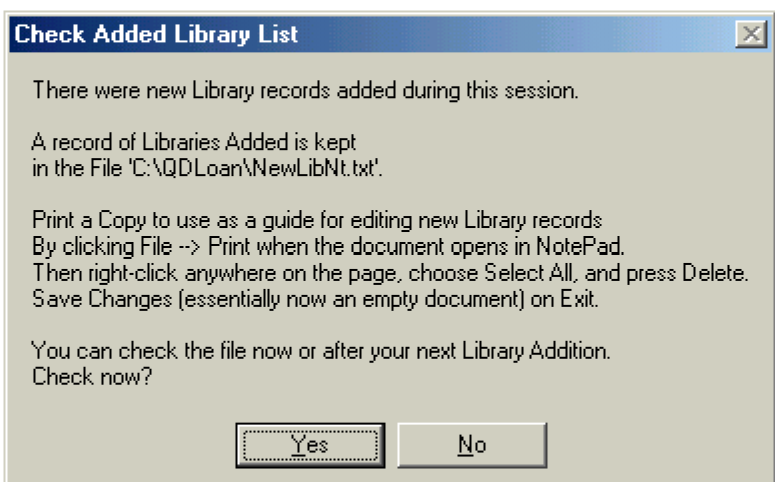
Changes in QDPortal Import Log Reports

Reports at the end of the QDPortal Import Session

QuickDOC has always produced various reports after importing data saved in QDPortal, to log new Patrons created, new Libraries, problems with updates, etc. In versions prior to 2.1.2 there was an option to Print the report at the end of the session, in most cases, or to open the report, in others.

In order to make these reports more useful, behavior has been standardized in 2.1.2 to use **Open as the default action for all the Import reports**. Using Open provides a consistency for all situations where the program wants to give an alert that some action has been taken (or not taken) that the user should know about. It also provides a chance to edit, print or even discard all the notification data if the user decides it's not needed as a printout. This last function provides an easy way to clear out a log file without having to use Windows Explorer or some other method to locate and delete it.

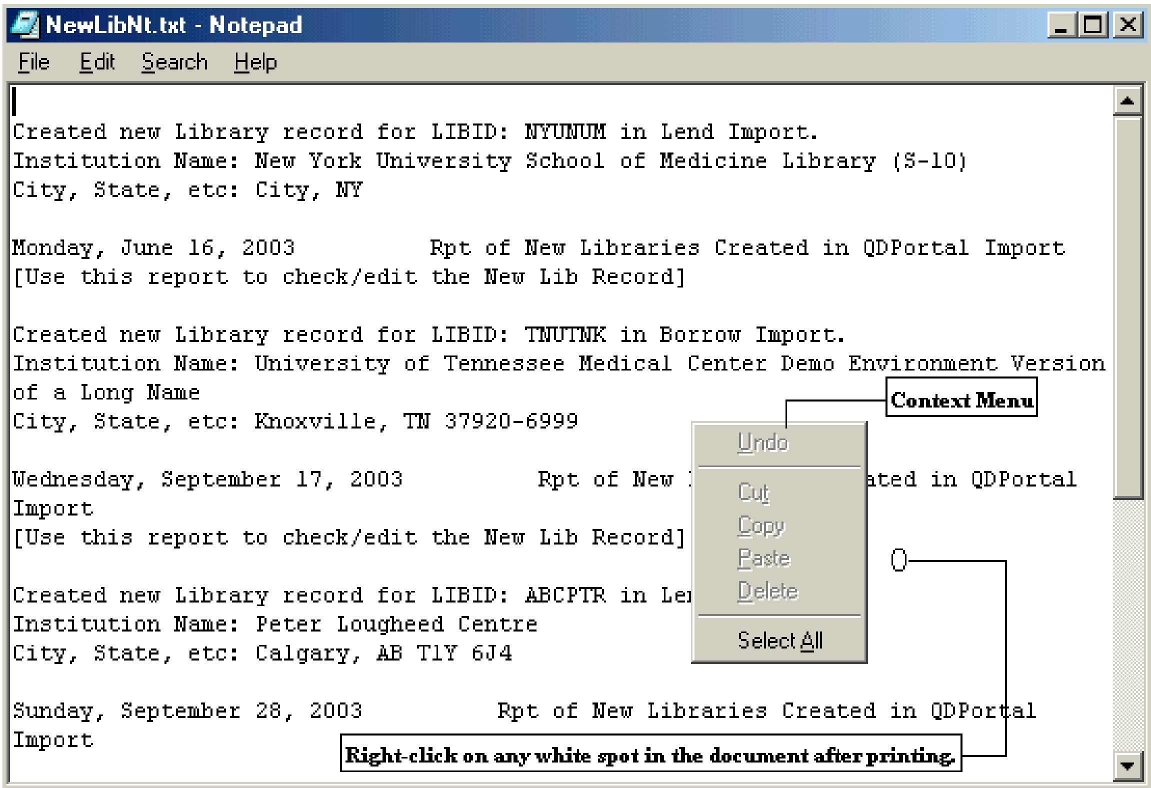
All Message Boxes announcing these alerts now have the following format:



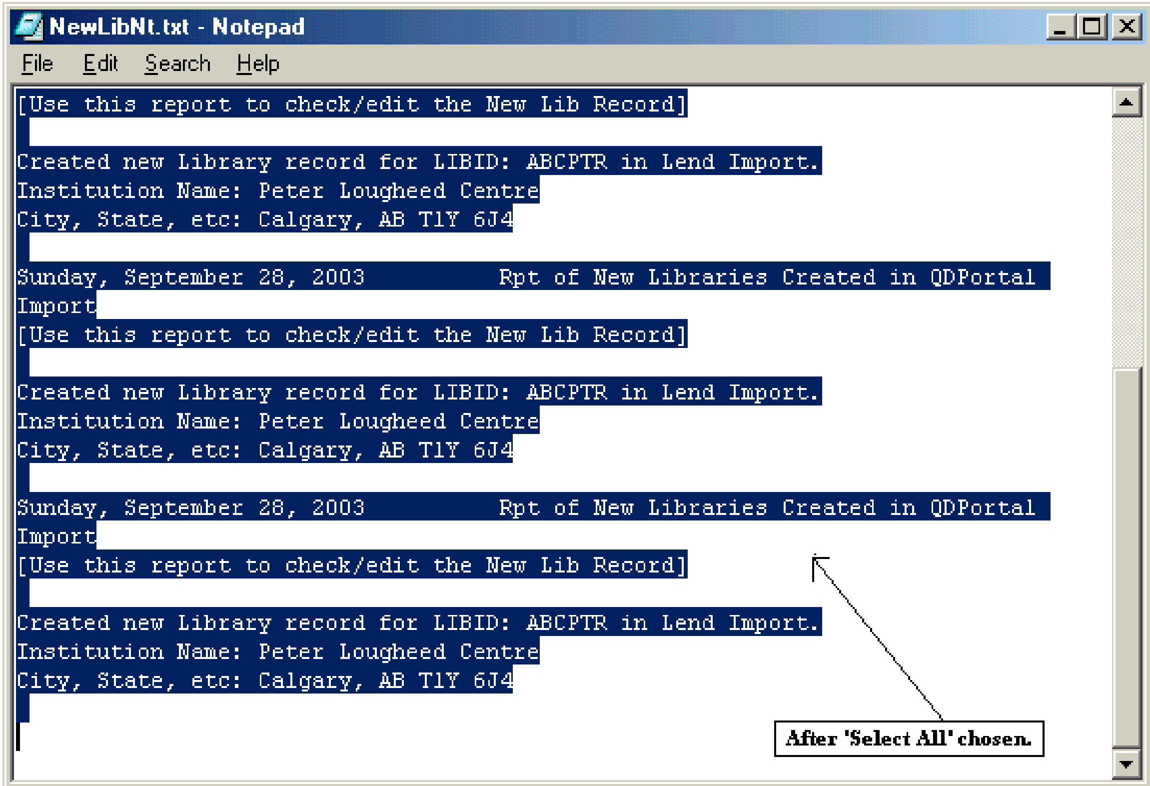
In this case, the note is that a new library (or libraries) has been added. Generally you will want to print a notice to have on hand as a reminder to edit the new Library record, so that you can assign Library Groups, contact information, etc. In particular, for Libraries created during a Borrow transaction, QuickDOC won't be able to automatically fill in Address information. In general, for these cases you will see only the word **City** to indicate that it needs to be looked up (state will be there, since it can be inferred from the LIBID).

After editing, and printing, you can **clear out the NewLibNt file** (or any of the log files) for the next new library notice by using the following method:

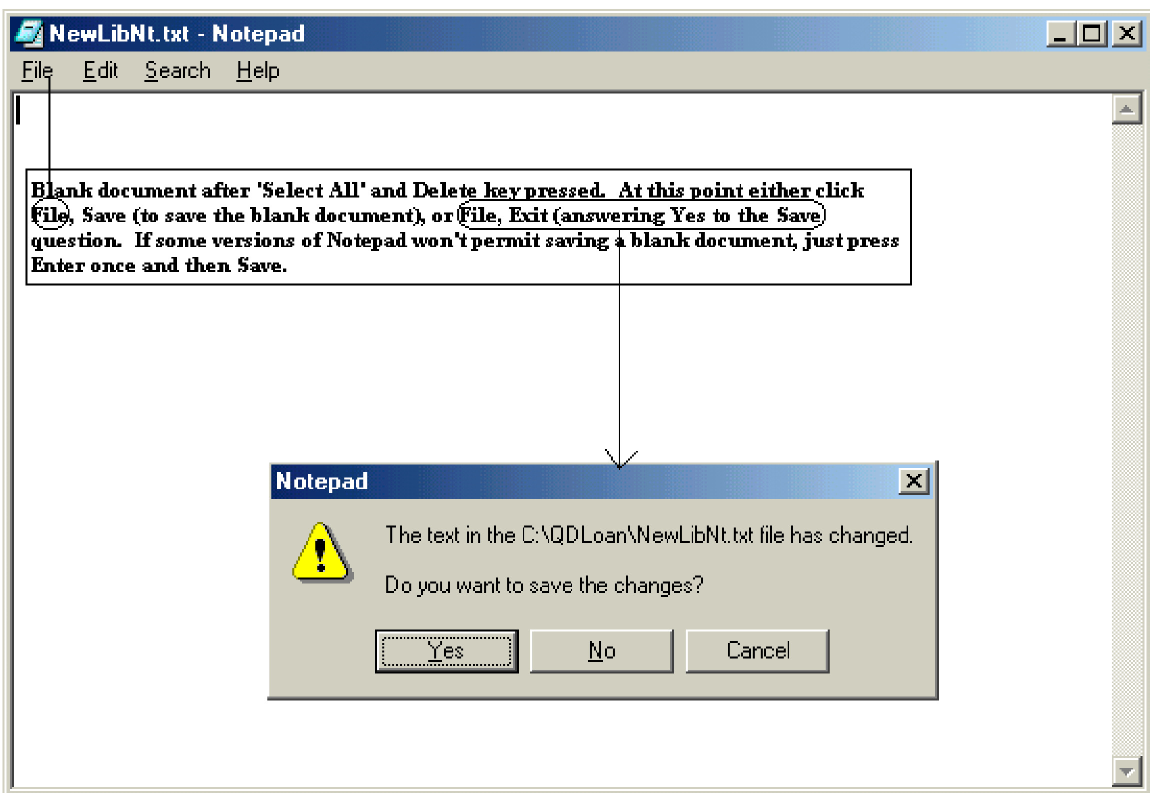
1. Right-click any white space in the document window and choose Select All.



2. This will cause the entire document to be selected.



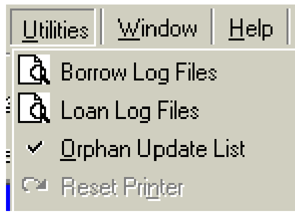
3. Press the **Delete key** to delete the chosen text, then click File and Exit from the **Notepad** File Menu.



4. Click Yes to save the blank document. If your version of Notepad won't permit saving a blank document, just press Enter once on the first line to give the program something to save.

Access to Import Log Reports from the Utilities Menu

In addition to the access to reports given at the end of the import session, Version 2.1.2 also includes choices under the Utilities Menu for **Borrow Log Files** and **Loan Log Files**. These provide an alternate method for **viewing, editing and printing Import Log Files**. The Utilities Menu appears as follows:

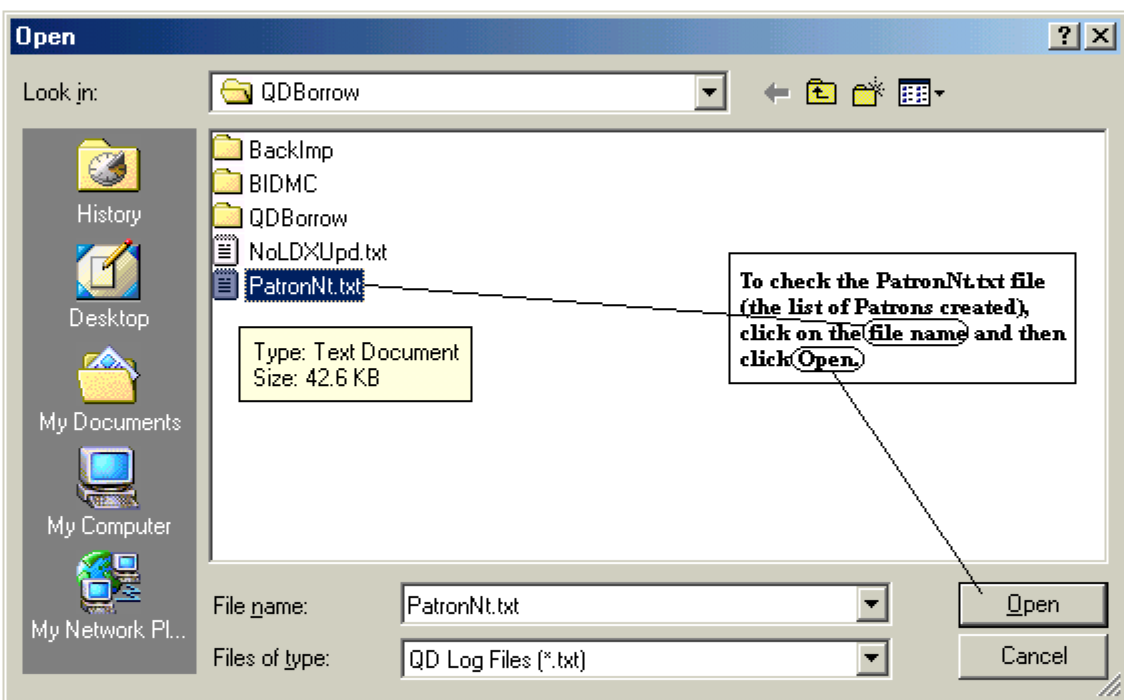


Borrow Log Files

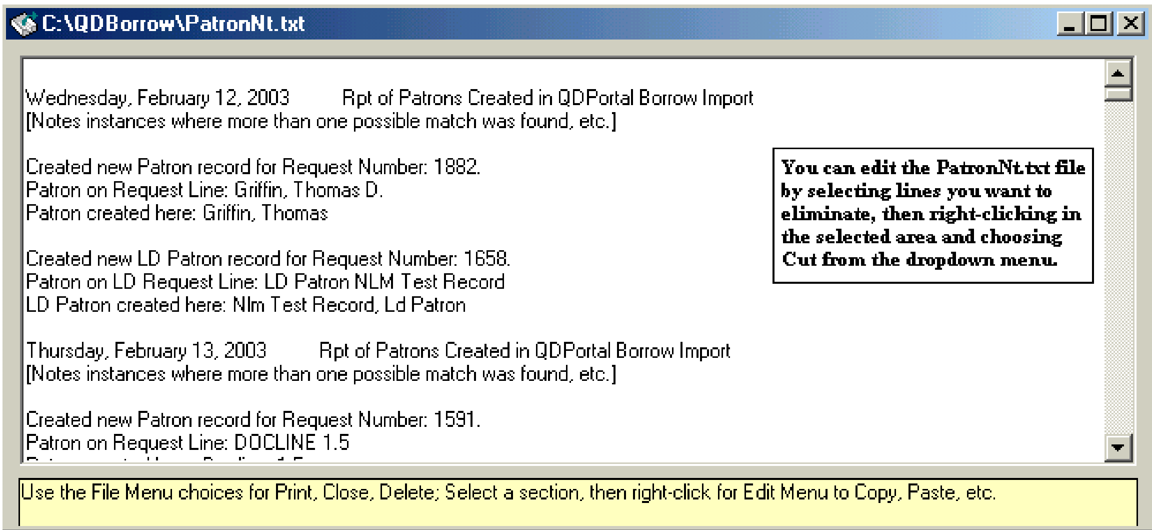
The Borrow Log Files choice displays an **Open Dialog** with any existing Borrow Log files listed. Borrow Log Files that may appear here are the following:

LDUpFail.txt
NoLDSave.txt
NoLDXUpd.txt
NoSave.txt
PatronNt.txt

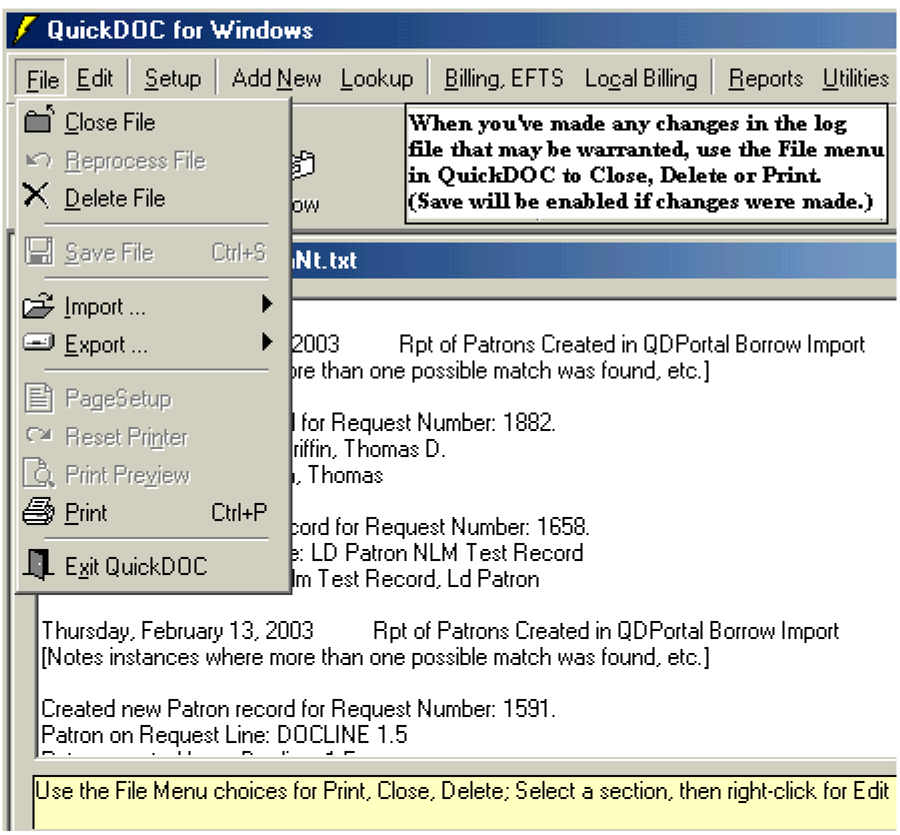
Following is an example of how this method can be used with the PatronNt.txt file, which is a list of all new Patrons created in the Import process. First, clicking the Borrow Log Files choice on the Utilities menu shows the Open Dialog with any existing log files:



Select the PatronNt.txt file by clicking on it and then clicking the **Open** button. The file is then displayed in the document window (not Notepad, but similar in behavior) for editing, printing, etc.



When you're finished editing, use the **File Menu choice in QuickDOC** to take action on the file, including **Close File**, **Delete File** or **Print File**. You'll also see the **Save File** choice enabled if indeed there have been any changes.



Loan Log Files

The Loan Log Files choice displays an **Open Dialog** with any existing Loan Log files listed. Loan Log Files that may appear here are the following:

NewLibNt.txt
NoSave.txt
NoUpdt.txt
UpdtFail.log

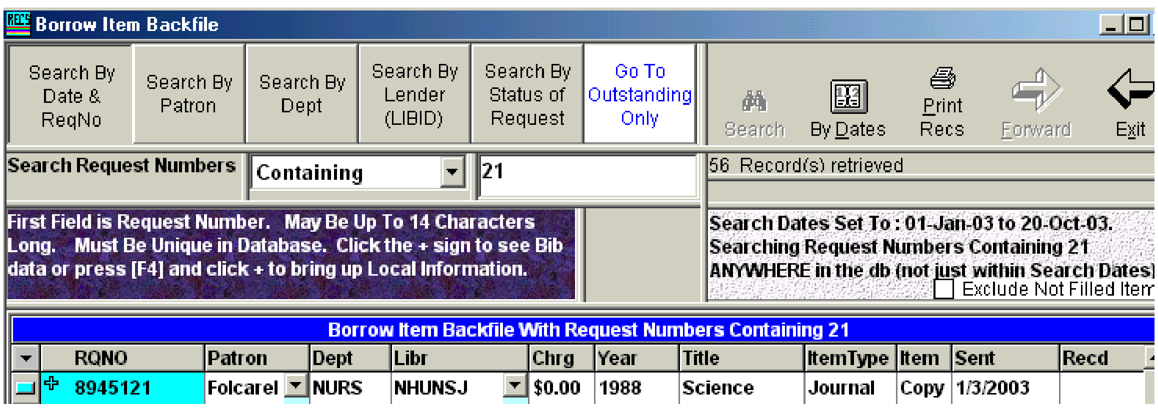
Methods of dealing with these are the same as with the PatronNt.txt example above. (The OrphUpdt.txt file still has its own entry on the Utilities Menu.)

Request Number Searches

Request number searches in both Borrow and Lend will always search the entire database, except for searches Beginning With something and searches with no Search Criterion, which will include only requests within the Beginning and End Dates specified. In order to make this a little clearer, more descriptive messages are displayed in the gray box on the right, just above the Grid:

Searches Containing …

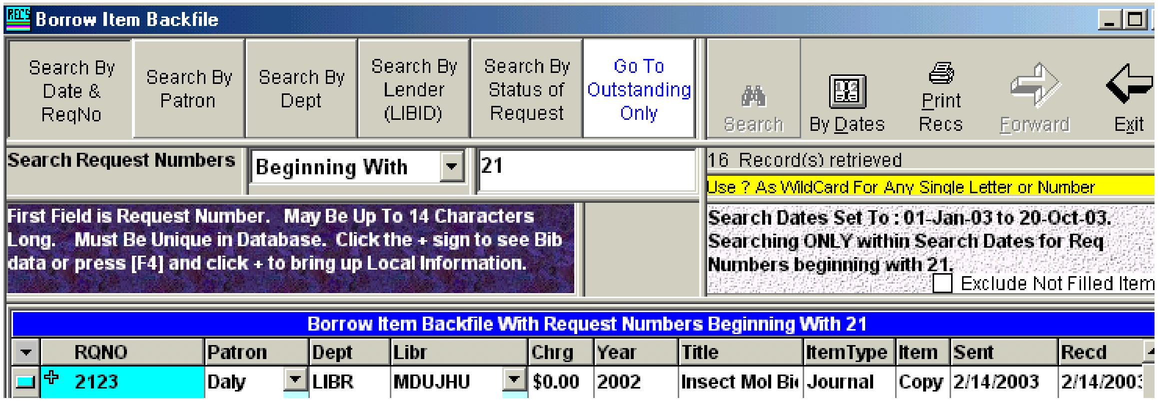
Containing is the **default search limiter**. This value (along with all the other values except for Beginning With) **will search the entire database for matching values if anything is entered as a search value**. The message displayed on the right will now reflect this:



If the search box is left blank then the grid will display all items for the search dates specified.

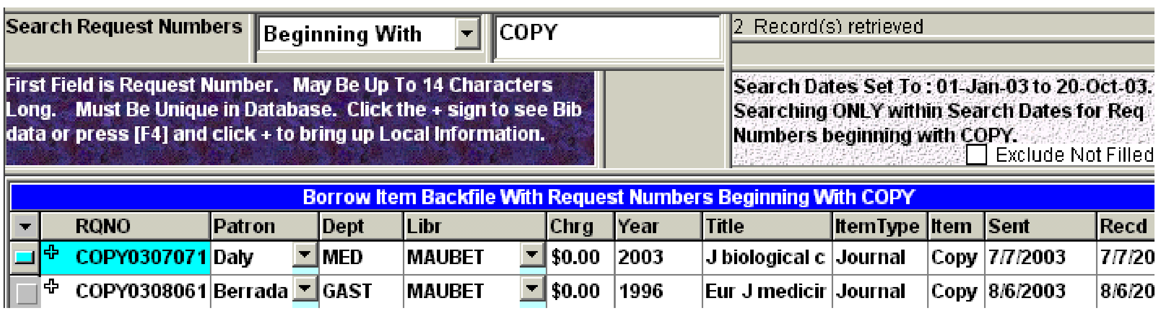
Searches Beginning With …

Beginning With Request Number searches allow for **restricting the search to only the current Search Dates specified**. This value entered will be searched only within the Begin Date and End Date. The message displayed on the right will now reflect this:



If the search box is left blank then the grid will display all items for the search dates specified, as with all the other search limiters.

The most common use of the Beginning With search is for getting a quick snapshot of either non-DOCLINE activity (assuming you're using standard prefixes for those items) or Copy Service activity (where the prefix is COPY). For **Copy Service**, for example, just set the dates and type in COPY as the **Beginning With value**:

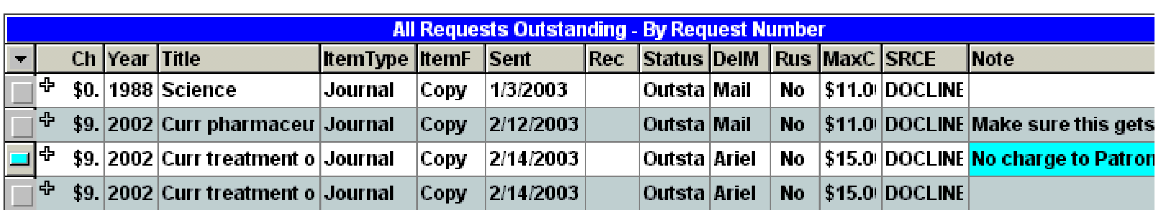


All your Copy Service items will be displayed, sorted by Date Received. You can then re-sort the list by any column (e.g., Patron, to order the list by Patron) to see subsets of Copy Service activity.

Requests Outstanding Note Field

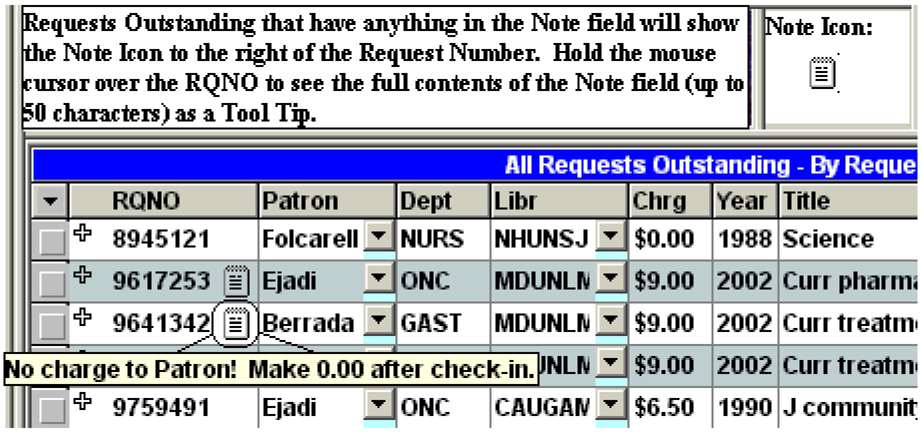
Note Icon

The Requests Outstanding Grid contains a **Note field** in the far right column of the Grid (as does the Borrow Item Backfile Grid, but the Note Icon will only appear on Requests Outstanding). In most cases, the Note field is scrolled off at the right of the screen and isn't therefore visible unless the grid is scrolled to the right. And when the grid is scrolled to the right, the important fields to the left are out of sight:



In some libraries it is common to put notes in this field regarding disposition of the item when it's checked in, and other pertinent information about the request (there's only 50 spaces available for the note, so it can only be a brief message). Because the Note field isn't normally visible, and requires a scroll to the right even to see whether or not a note is present, it is easy to miss this information.

Version 2.1.2 provides a visual clue to the presence of something in the Note field, the **Note Icon**:



Any row that has an entry in the Note field (except for the default Loansome Doc entry of "Refer on…") will display the Note Icon to the right of the Request Number. When the Note Icon is present, you can also check the contents of the Note field without scrolling by moving the mouse **cursor over the Note Icon** for that row. The **contents of the Note field will then appear as a Tool Tip** (as shown above).

It may be necessary to **make the RQNO Column wider**, to allow space for the Note Icon without obscuring the latter part of the Request Number. Do so by moving the mouse cursor up to the vertical line between RQNO and Patron (the cursor will change to a cross shape)…

…and dragging the vertical border to the right...

Once this change is made, it should continue thereafter each time you start up QuickDOC (it will be observed in both the Requests Outstanding and Borrow Item Backfile Grids, but not on the Lend side).

Adding Notes in Requests Outstanding

The quickest method for adding a note to an item in the Requests Outstanding Grid is as follows:

1. Click once into the **Request Number cell** of the item where the note is to be added;
2. Press the **End** key to pop over to the Note field;

3. Start typing the note;
4. Press **Enter** when finished, to post the note and return to the leftmost column of the Grid.

Clearing Notes in Requests Outstanding

The quickest method for clearing a note field in the Requests Outstanding Grid is as follows:

1. Click once into the **Request Number cell** of the item where the note is to be cleared;
2. Press the **End** key to pop over to the Note field;
3. Press **<F5> to clear the field**;
4. Press **Enter** when finished, to clear the note and return to the leftmost column of the Grid.

Pressing **<F5> in the Note field** is equivalent to pressing **<F2> to begin a field edit**, **<Home> to move to the beginning of the field**, and **<Ctrl><Delete> to clear the contents of a field**.

Patrons with an allotment of Free Items per Year

There is a column in the **Local Charge Profile** that provides for assigning a number of **Free Items per year** to Patrons who have been assigned that Charge Profile. As a method of notifying the Library Staff when a Patron has reached, or is about to reach, that **maximum number of Free Items**, QuickDOC will make a check during every QDPortal Import for each Patron to see:

1. Does the Charge Profile assigned to this Patron include a Free Items entry greater than 0; and
2. If so, is the number of items already received for this Patron during this (fiscal or calendar) year **greater than the Maximum Number of Free Items minus 3**?

If both of these criteria are met, QuickDOC will put a note in the BorrowNote field during import. The format of the note will be "**Patron has X Free items (Max allowed = Y)**," where **X** is the number already received and **Y** is the total Free Items listed in the Charge Profile. **Holding the mouse cursor over the Note Icon will display the note**:

Note Icons, and the formatted note, will continue to appear, with incrementing numbers for X, though not for Y, until the end of the year, when the numbers are reset. It is the first few appearances of the Note Icon, however, which are meant to alert Library Staff that invoices are about to be needed for the Patron involved. You can leave the generated notes alone (as an easy reminder of how much you've done for this Patron) or you can also blank out the Note field, which will also suppress the Note Icon on future Requests Outstanding displays for that row.

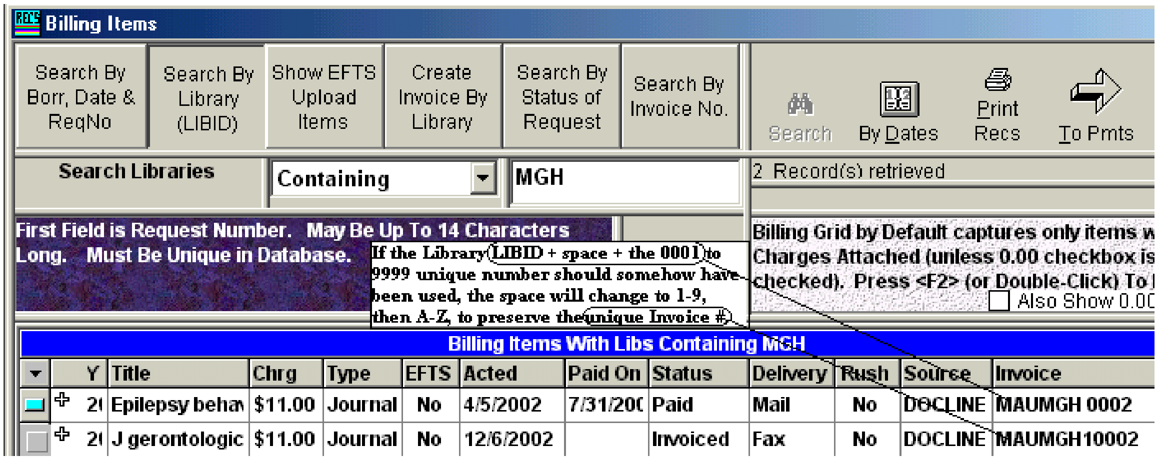
Library Billing

The following changes in Library Billing are included in QuickDOC Version 2.1.2:

Library Invoice Numbers

Library Invoice numbers should be unique. Version 2.1.2 uses slightly different methods from previous QuickDOC versions to ensure this uniqueness. Library Invoice Numbers are created using the Borrowing Library's **LIBID**, a **space**, and a formatted **four-digit number** running from 0001 to 9999. The count for **Library Invoice Control Numbers** is kept in the value **LastLendInv** in **tblLocals**. A typical Library Invoice Number is **MAUMGH 0002**. (**Invoice Numbers for EFTS Uploads** are equal to the **EFTS Upload File Name**.)

After 9999 the number resets back to 0001, so that there will be about 10,000 invoices before the control number reappears. Even then, the LIBID in the first part of the number should, in most cases, make it unique. Nevertheless, QuickDOC will check **tblInvoices** first, to prevent **duplicate Invoice numbers**. **If the invoice number already exists in tblInvoices**, then the **Library Invoice Number** is altered, by adding a single digit in the space between the LIBID and the control number, from 1 to 9 and then from A-Z, until the resulting number is unique in tblInvoices. If the next Library Invoice number is 0002, and the Library is MAUMGH, and an Invoice number **MAUMGH 0002** already exists, the Invoice number will be changed to **MAUMGH10002**:



Duplicate EFTS Invoice/File Names are made unique by adding the 1-9 or A-Z at the end of the filename. HTML Copies of Invoices will also use the augmented version of the Invoice Number, but the filename saved will ignore the newly-added digit, so that invoice **MAUMGH10002** will be found under filename **LInv0002** in the Export folder.

Canadian Bilingual Library Invoice Format

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Library Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Library record and on the Addresses Tab on the Local Preferences form, but bilingual labels will be displayed on the printout wherever possible.

Even with these changes, if you're using bilingual labels, you should try to keep the entries for **Make Check Payable To**/**Prière de faire le chèque à l'ordre de** and **Terms**/**Conditions** as concise as possible, since space here is limited.

Here's an example of the Library Invoice with Use Canadian Invoice format checked:

Invoice/Facture

01-Jun-03 to/au 30-Jun-03

Choosing the Canadian format prints bilingual tags and labels in most cases.

8-Sep-2003 **Invoice No/No de facture: TNUTNK 0001** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Beth Israel Deaconess Med Ctr

Terms/Conditions: NET 30

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Because the bilingual format takes up more space, some entries may use two lines instead of one in the English only format.

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

Address information and bibliographic information will follow whatever format you have entered in the Library or bibliographic record.

Req No/No de demande	*Year Title/Année Titre*	*Citation/Référence*	*Patron/Usager*	*Chg/Frais*	*Date fld/d'envoi*
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03

Total Items For/Total des requêtes pour TNUTNK: 1 **Total Charges/Total des frais: $11.00**

Library Invoice with Invoice Address Above Return Address

If you have checked the **Put Invoice Address above Return Addr** checkbox on the Local Preferences form, the Invoice Address will appear on top. This is useful for window envelopes where the window appears about halfway up rather than toward the lower left of the envelope. In such cases, folding the invoice in thirds may produce a result like the following:

01-Aug-00 to 31-Oct-00

27-Dec-2000 top of window **Invoice Number: MAUHYA 0001** **Page 1**

Make Check Payable To: Agoos Medical Library

Terms: NET 30

Right side of envelope window.

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02215

Tel: 617-667-4225
Fax: 617-667-7197
jay@caregroup.harvard.edu
FedID: 1234-55
Cost Center: 1884

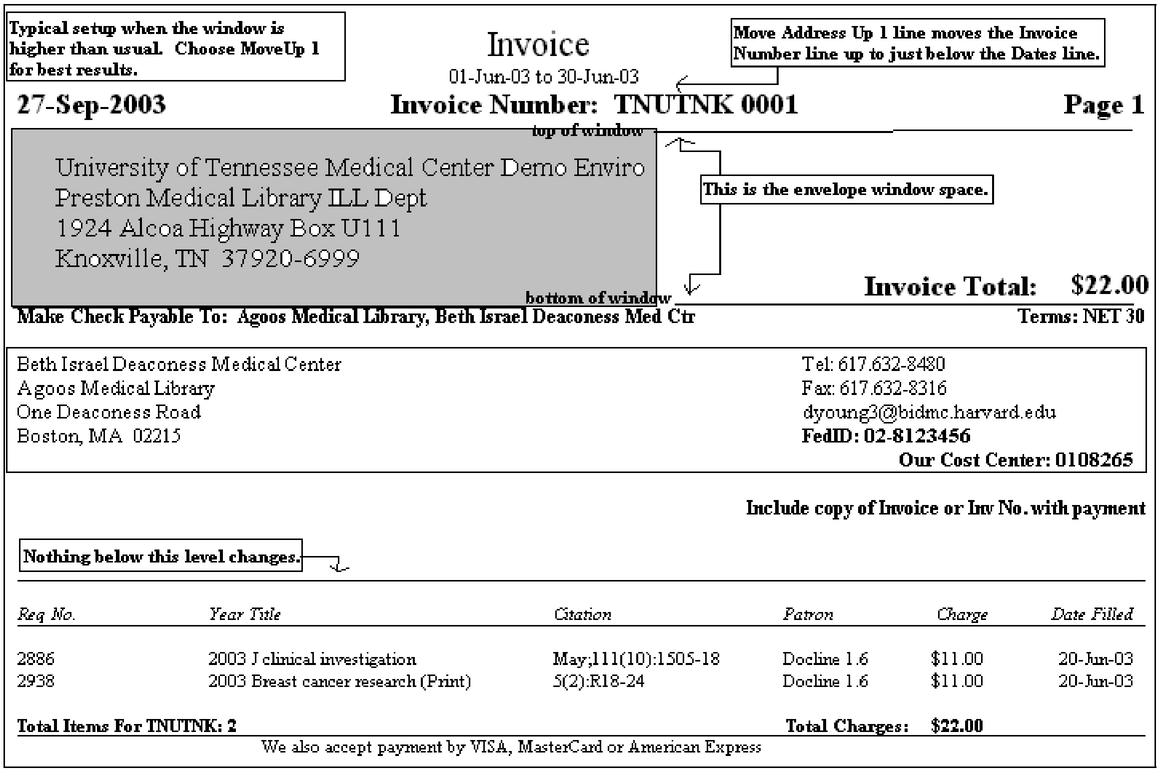
bottom of window

Include copy of Invoice or Inv No. with payment

CAPE COD HOSPITAL
Frazier-Grant Medical Library ILL
27 PARK STREET PO BOX 640
HYANNIS, MA 02601

If your Window Envelopes show the pattern above after folding, you may want to swap the Return and Invoice Addresses, using the checkbox on the Billing Prefs Tab of the Local Preferences Form.

After checking the checkbox, the positions are reversed (also adding a 1-line move up pushes the Invoice Number line above the window as well):



Typical setup when the window is higher than usual. Choose MoveUp 1 for best results.

Invoice

01-Jun-03 to 30-Jun-03

Move Address Up 1 line moves the Invoice Number line up to just below the Dates line.

27-Sep-2003 **Invoice Number: TNUTNK 0001** **Page 1**

top of window

University of Tennessee Medical Center Demo Enviro
Preston Medical Library ILL Dept
1924 Alcoa Highway Box U111
Knoxville, TN 37920-6999

This is the envelope window space.

bottom of window

Invoice Total: $22.00

Make Check Payable To: Agoos Medical Library, Beth Israel Deaconess Med Ctr **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tel: 617.632-8480
Fax: 617.632-8316
dyoung3@bidmc.harvard.edu
FedID: 02-8123456
Our Cost Center: 0108265

Include copy of Invoice or Inv No. with payment

Nothing below this level changes.

Req No.	*Year Title*	*Citation*	*Patron*	*Charge*	*Date Filled*
2886	2003 J clinical investigation	May;111(10):1505-18	Docline 1.6	$11.00	20-Jun-03
2938	2003 Breast cancer research (Print)	5(2):R18-24	Docline 1.6	$11.00	20-Jun-03

Total Items For TNUTNK: 2 **Total Charges: $22.00**

We also accept payment by VISA, MasterCard or American Express

Local Billing

The following changes in Local Billing are included in QuickDOC Version 2.1.2:

Print Patron Copy Service Bills

A new **Print Patron Copy Service Bills** choice prints the batch of Invoices that include only Copy Service Items (and using the **CHRGAsPatron** charge) for the period selected. In order to see this choice on the dropdown menu under Local Billing on the Menu Bar, you must have checked the **Separate Copy Service Invoices?** checkbox on the **Billing Prefs Tab** of the **Local Preferences Form**. The **Patron Invoice (Copy Service)** format is as follows:

Invoice (Copy Service)
01-Jan-03 to 31-Jul-03

Copy Service Invoices all end in CS

16-Aug-2003 **Invoice Number: P6 0001CS** **Page 1**

Make Check Payable To: Agoos Medical Library **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tel: 617.632-8480
Fax: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Center: 0108266

Include copy of Invoice or Inv No. with payment

Jay Daly
LIBR

Invoice Total: $2.00

Item#	*Dept*	*Cost Ctr*	*ReqID*	*Item*	*Charge*	*Date Rec'd*
1	LIBR	Medical Library	COPY0307071	2003 J biological chemistry Jun 17;():21-31	$2.00	07-Jul-03

Total Items For Cost Center Medical Library : 1 **Cost Ctr Chrg: $2.00**

Total Items For Daly, Jay: 1 **Total Charges: $2.00**

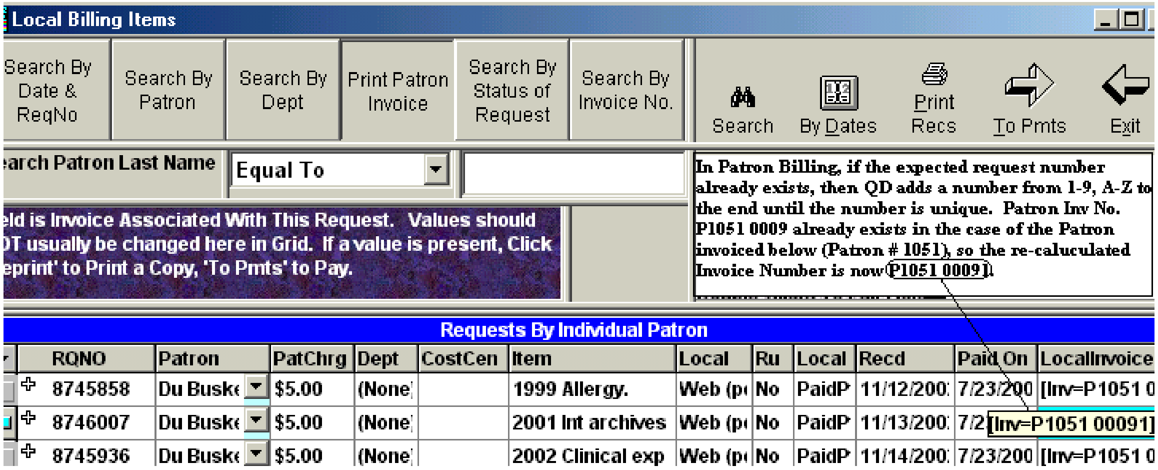
The main differences between the Copy Service and regular Patron Invoice are in the Title (which includes the words **Copy Service**), the Invoice Number (which always ends in **CS**) and the fact that only copy service items (which usually begin with **COPY**) are included.

HTML Copy Service Invoices for Patrons are quite similar to regular HTML invoices (with the usual Copy Service additions) and are saved under the Invoice Number filename without the CS appended at the end.

Patron Invoice Numbers

Local Invoice numbers should be unique. Version 2.1.2 uses slightly different methods from previous QuickDOC versions to ensure this uniqueness. Patron Invoice Numbers are created as follows: First, a P identifies it as a Patron bill. Then the actual Patron Number is used, to identify it with that patron. After a space, a formatted **four-digit number** is added, the numbers running from 0001 to 9999. The count for **Patron Invoice Control Numbers** is kept in the value **LastPatInv** in **tblLocals**. A typical Patron Invoice Number is **P1234 0002** where 1234 is the Patron Number of the Patron being invoiced.

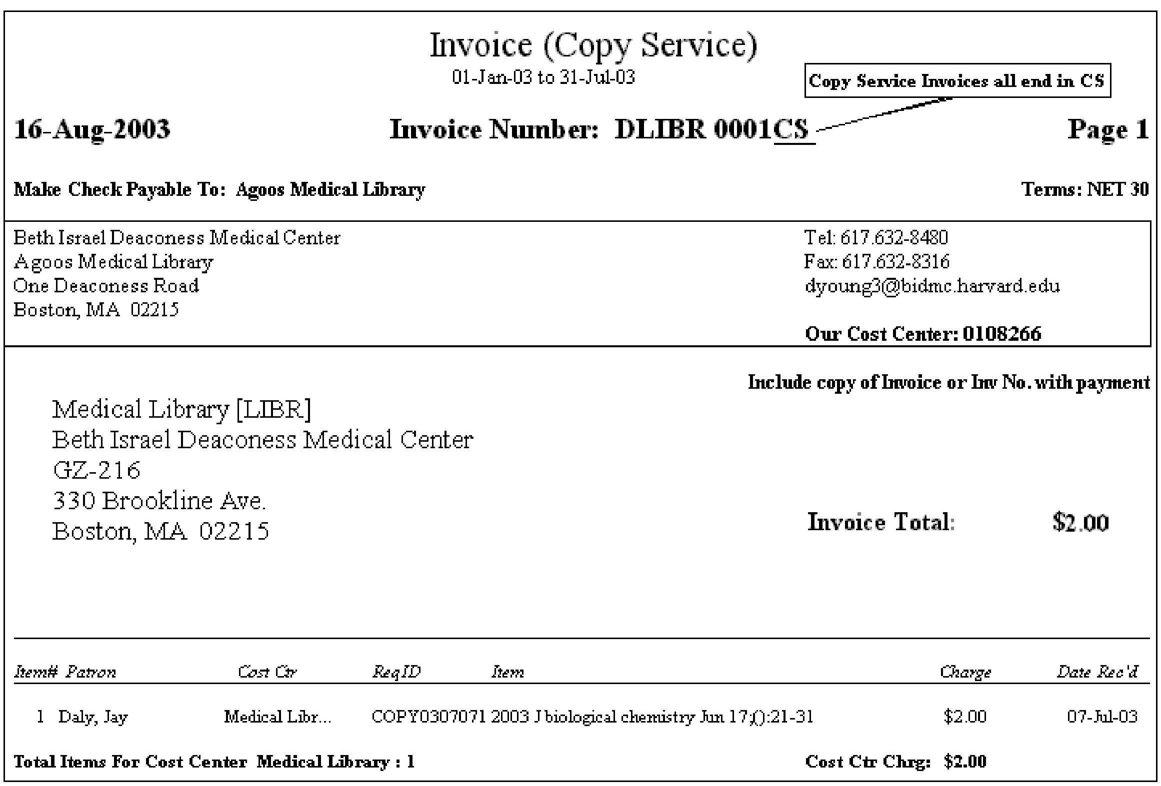
After 9999 the number resets back to 0001, so that there will be about 10,000 patron invoices before the control number reappears. Even then, the left side of the Patron Invoice Number (which includes the unique Patron Number) should, in most cases, make it unique. Nevertheless, QuickDOC will check **tblPatInvoices** first, to prevent **duplicate Invoice numbers**. **If the invoice number already exists in tblPatInvoices**, then the **Patron Invoice Number** is altered, by adding a single digit at the end of the invoice number, from 1 to 9 and then from A-Z, until the resulting number is unique in tblPatInvoices. If the next Patron Invoice number is 0002, and the Patron Number is P1234, and the Invoice number **P1234 0002** already exists, the Invoice number will be changed to **P1234 00021**:



HTML Copies of Invoices will also use the augmented version of the Invoice Number, but the filename saved will ignore the newly-added digit, so that invoice **P1234 00021** will be found under filename **PInv0002** in the Export folder. Since these files are transitory by nature (they're sent off promptly as email attachments to Patrons), this should not result in any future problems of duplication.

Print Dept Copy Service Bills

A new **Print Dept Copy Service Bills** choice prints the batch of Invoices that include only Copy Service Items (and using the **CHRGAsDept** charge) for the period selected. In order to see this choice on the dropdown menu under Local Billing on the Menu Bar, you must have checked the **Separate Copy Service Invoices?** checkbox on the **Billing Prefs Tab** of the **Local Preferences Form**. The **Dept Invoice (Copy Service)** format is as follows:



Invoice (Copy Service)

01-Jan-03 to 31-Jul-03

Copy Service Invoices all end in CS

16-Aug-2003 **Invoice Number: DLIBR 0001CS** **Page 1**

Make Check Payable To: Agoos Medical Library **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tel: 617.632-8480
Fax: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Center: 0108266

Include copy of Invoice or Inv No. with payment

Medical Library [LIBR]
Beth Israel Deaconess Medical Center
GZ-216
330 Brookline Ave.
Boston, MA 02215

Invoice Total: $2.00

Item#	*Patron*	*Cost Ctr*	*ReqID*	*Item*	*Charge*	*Date Rec'd*
1	Daly, Jay	Medical Libr...	COPY0307071	2003 J biological chemistry Jun 17;():21-31	$2.00	07-Jul-03

Total Items For Cost Center Medical Library : 1 **Cost Ctr Chrg: $2.00**

The main differences between the Copy Service and regular Dept Invoice are in the Title (which includes the words **Copy Service**), the Invoice Number (which always ends in **CS**) and the fact that only copy service items (which usually begin with **COPY**) are included.

HTML Copy Service Invoices for Departments are quite similar to regular HTML invoices (with the usual Copy Service additions) and are saved under the Invoice Number filename without the CS appended at the end.

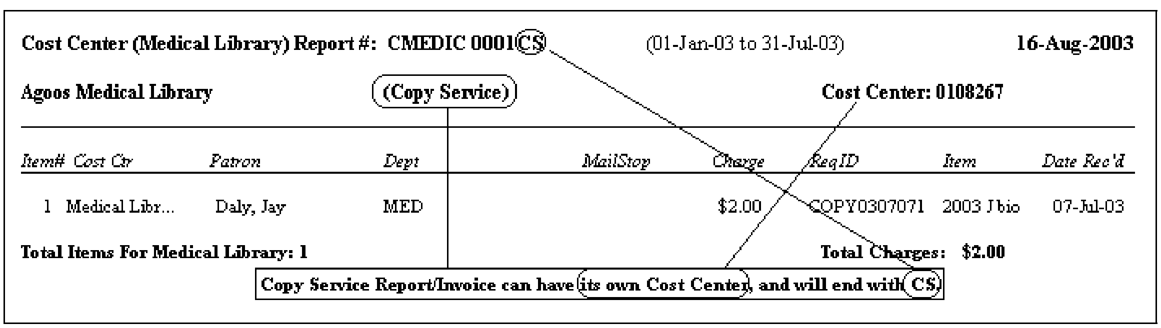
Department Invoice Numbers

Local Invoice numbers should be unique. Version 2.1.2 uses slightly different methods from previous QuickDOC versions to ensure this uniqueness. Department Invoice Numbers are created as follows: First, a D identifies it as a Department bill. Then the first five digits of the Department Abbreviation are used, to identify it with that Department. After a space, a formatted **four-digit number** is added, the numbers running from 0001 to 9999. The count for **Department Invoice Control Numbers** is kept in the value **LastDepInv** in **tblLocals**. A typical Department Invoice Number is **DNEPH 0002** where NEPH is the Department Abbreviation for the Department being invoiced.

After 9999 the number resets back to 0001, so that there will be about 10,000 Department invoices before the control number reappears. Even then, the left side of the Department Invoice Number (which includes the unique Department Number) should, in most cases, make it unique. Nevertheless, QuickDOC will check **tblDepInvoices** first, to prevent **duplicate Invoice numbers**. **If the invoice number already exists in tblDepInvoices**, then the **Department Invoice Number** is altered, by adding a single digit at the end of the invoice number, from 1 to 9 and then from A-Z, until the resulting number is unique in tblDepInvoices. If the next Department Invoice number is 0002, and the Department Number is DNEPH, and the Invoice number **DNEPH 0002** already exists, the Invoice number will be changed to **DNEPH 00021**. HTML Invoices follow the same rules as Patron Invoices.

Print Copy Service Cost Center Report

The new **Copy Service Cost Center Report** has a different format than either the Patron or Department Copy Service Invoice, but **it also functions as an Invoice for Copy Service Activity billed by Cost Center**, and will set the **Local Status to InvDep** and will file an Invoice record in **tblDepInvoices** in QuickDOC.MDB. In order to see this choice on the dropdown menu under Local Billing on the Menu Bar, you must have checked the **Separate Copy Service Invoices?** checkbox on the **Billing Prefs Tab** of the **Local Preferences Form**. The **Copy Service Cost Ctr Report** format is as follows:


Cost Center (Medical Library) Report #: CMEDIC 0001CS (01-Jan-03 to 31-Jul-03) 16-Aug-2003

Agoos Medical Library (Copy Service) Cost Center: 0108267

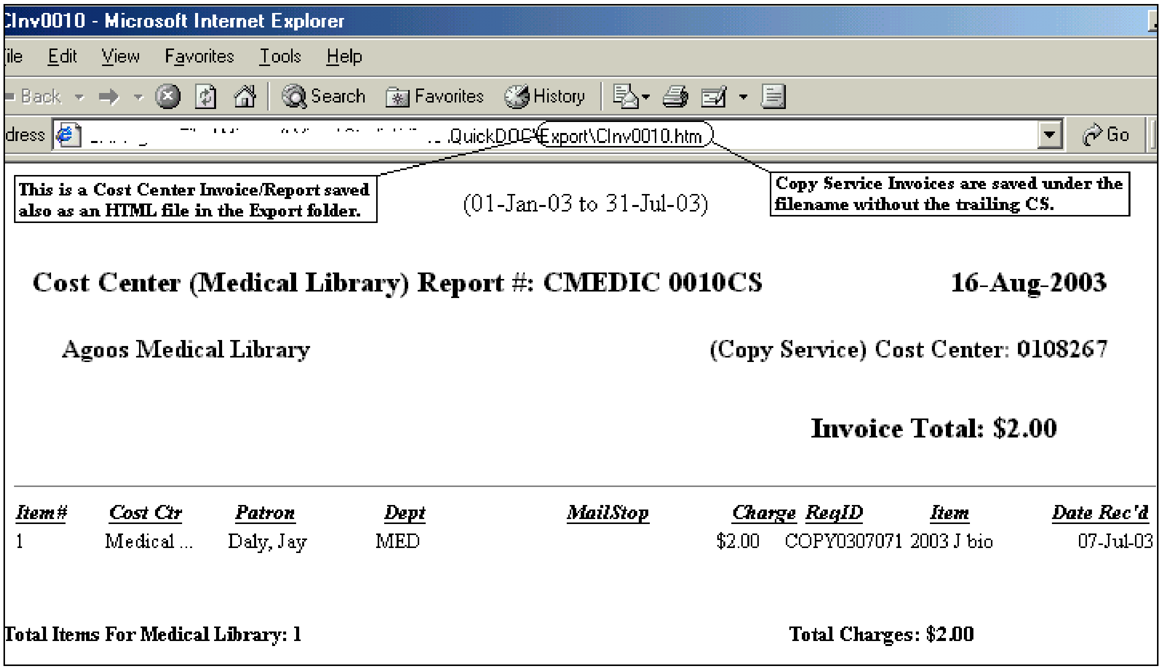
Item#	Cost Ctr	Patron	Dept	MailStop	Charge	ReqID	Item	Date Rec'd
1	Medical Libr...	Daly, Jay	MED		$2.00	COPY0307071	2003 Jbio	07-Jul-03

Total Items For Medical Library: 1 Total Charges: $2.00

Copy Service Report/Invoice can have its own Cost Center, and will end with CS

The main differences between the Copy Service and regular Cost Center Report are in the line with the Library Name and Cost Center (which clearly notes, in parentheses, the words **Copy Service**), the Invoice Number (which always ends in **CS**) and the fact that only copy service items (which usually begin with **COPY**) are included.

HTML Copy Service Cost Center Reports are quite similar to regular HTML Cost Center Reports (with the usual Copy Service additions) and are saved under the Invoice Number filename without the CS appended at the end. Here's an example:



Cost Center Invoice Numbers

Cost Center reports/invoices are essentially Department Invoices, but are sorted by Cost Center and have invoice numbers that begin with a C rather than a D. Then the first five digits of the Cost Center are used. After a space, a formatted **four-digit number** is added, the numbers running from 0001 to 9999. The count for **Cost Center Invoice Control Numbers** is kept in the value **LastDepInv** in **tblLocals** along with the Department Invoice count, since these are, in fact, Department invoices. A typical Cost Center Invoice Number might be **C12345 0002** where 12345 are the first five digits of the Cost Center. Methods for creating uniqueness are the same as for Department Invoice Numbers.   HTML Invoices follow the same rules as Department Invoices.

Primary Cost Center no longer shown at top of Patron/Dept Invoice

In earlier versions, at the top of each Patron or Department Invoice, just above the Invoice Total, the Patron's Primary Cost Center was listed. Because the Cost Center is also listed on each request line, this extra listing was either redundant or confusing to those receiving the Invoices. Version 2.1.2 no longer lists this value at the top, which also serves to reduce the clutter in that area of the Invoice as well:

Invoice

01-Jan-02 to 30-Apr-02

15-Aug-2002 **Invoice Number: P160 0069** **Page 1**

Make Check Payable To: Agoos Medical Library **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
330 Brookline Ave.
Boston, MA 02215

The Library's Cost Ctr now says "Our" Cost Center (rather than just "Cost Center" to be more clear whose Cost Center it is.

Tel: (617) 667-4225
Fax: (617) 667-7197
jay@caregroup.harvard.edu
Our Cost Center: 1884

Include copy of Invoice or Inv No. with payment

Bernice Pasut
HEMONC
B115

Local (Patron/Dept) Invoice prior to 2.1.2 noted the Patron/Dept Primary Cost Center here. Since each item also has its Cost Center listed, noting the Primary Cost Center at the top was found to be either redundant or confusing, and has been eliminated in Version 2.1.2.

~~Primary Cost Center: 7887~~

Invoice Total: $8.00

Item#	*Dept*	*Cost Ctr*	*ReqID*	*Item*	*Charge*	*Date Rec'd*
1	NC		05932236	1998 Quality of life from nursing patient perspectives	$4.00	01-Apr-02
Total Items With No Cost Center: 1				**No Cost Ctr $:**	**$4.00**	
2	HEMONC	7887	04915478	1998 Quality of life from nursing and patient perspect	$4.00	26-Feb-02
Total Items For Cost Center 7887: 1				**Cost Ctr Chrg:**	**$4.00**	
Total Items For Pasut, Bernice: 2				**Total Charges:**	**$8.00**	

Additionally, the Cost Center listed in the Return Address section at the top now says "Our Cost Center" rather than just "Cost Center" so that it's a bit more clear whose Cost Center this is.

Local Invoice with Invoice Address Above Return Address

If you have checked the **Put Invoice Address above Return Addr** checkbox on the Local Preferences form, the Invoice Address will appear on top. This is useful for window envelopes where the window appears about halfway up rather than toward the lower left of the envelope. This address swap for Patron (and Department) Invoices will appear as follows:

Invoice

01-Jan-03 to 31-Jan-03

28-Sep-2003 **Invoice Number: P890 0001** **Page 1**

[illegible]
Beth Israel Deaconess Medical Center
E/ST-214
330 Brookline Ave.
Boston, MA 02215

Patron Invoice with Invoice Address above Return Address. For envelopes with higher windows than the typical window envelope.

Make Check Payable To: Agoos Medical Library, Library ILL Fund **Terms: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tel: 617.632-8480
Fax: 617.632-8316
dyoung3@bidmc.harvard.edu
FedID: 02-8123456
Our Cost Center: 0108266

Include copy of Invoice or Inv No. with payment

Canadian Bilingual Local Invoice Formats

If you have checked the **Use Canadian Invoice format?** checkbox on the Local Preferences form, your Local Invoices will have bilingual (English/French) labels in most cases. Item data will still be in English (unless it was entered in French under Add Borrow or Add Lend), since it's been imported from DOCLINE, and address information will be as entered in the Patron or Department record and on the Addresses Tab on the Local Preferences form, but bilingual labels will be displayed on the printout wherever possible.

Even with these changes, if you're using bilingual labels, you should try to keep the entries for **Make Check Payable To**/**Prière de faire le chèque à l'ordre de** and **Terms**/**Conditions** as concise as possible, since space here is limited.

All Local Invoices (Patron/Dept/Cost Centre, as well as Copy Service versions of each) have Canadian format counterparts.

Matching Canadian format HTML Invoices are similar. Check the latest QuickDOC Help Index under "**Bilingual HTML [Type] Invoices**" for examples.

Here are examples of Local Invoices with the **Use Canadian Invoice format** checked.

Canadian Format Patron Invoice

Invoice/Facture

01-Jan-03 to/au 31-Jan-03

15-Sep-2003 **Invoice No/No de facture: P890 0001** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:

Agoos Medical Library, Library ILL Fund **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108266

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Betsy [illegible]wn
Beth Israel Deaconess Medical Center
330 Brookline Ave.
Boston, MA 02215

Invoice Total/Montant total facturé: $ 5.00

Canadian (bilingual) Patron Invoice uses two lines for Make Check, and is a little constricted in the column headers, but should be readable enough.

No.	Dept/Dép	Cost Ctr/Code budgétaire	ReqID/No de demande	Item/Référence	Chg/Frais	Date Rec'd/reçu
1	ADM	A12345	351627	1997 Anesthesiology. ():	$5.00	25-Jan-03

Total Items For/Total des requêtes pour A12345 : 1 **Cost Ctr Chrg/Frais chargés au code budgétaire: $5.00**

Total Items For/Total des requêtes pour Brown, Betsy: 1 **Total Charges/Total des frais: $5.00**

Canadian Format Dept Invoice

Invoice/Facture

01-Jan-03 to/au 31-Jan-03

15-Sep-2003 **Invoice No/No de facture: DADM 0001** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:

Agoos Medical Library, Library ILL Fund **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108266

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Admin. Dept [ADM]
Beth Israel Deaconess Medical Center
330 Brookline Ave.
Boston, MA 02215

Canadian (bilingual) Dept Invoice uses two lines for Make Check and is a bit constricted in column headers, but not by much.

Invoice Total/Montant total facturé: $ 5.00

No.	*Patron/Usager*	*Cost Ctr/Code budgétaire*	*ReqID/No de demande*	*Item/Référence*	*Chg/Frais*	*Date Rec'd/reçu*
1	Brown, Betsy (D	A12345	351627	1997 Anesthesiology. ():	$5.00	25-Jan-03

Total Items For/Total des requêtes pour A12345 : 1 **Cost Ctr Chrg/Frais chargés au code budgétaire: $5.00**

Total Items For/Total des requêtes pour ADM: 1 **Total Charges/Total des frais: $5.00**

Canadian Format Cost Centre Invoice

Cost Ctr/Code budgétaire (A12345) Rpt: CA1234 0001 (01-Jan-03 to/au 31-Jan-03) **20-Sep-2003**

Agoos Medical Library **Our Cost Centre/Code budgétaire: 0108266**

No	*Cost Ctr/Code budgétaire*	*Patron/Usager*	*Dept/Dép*	*MailStop/Destination*	*Chg/Frais*	*ReqID/No de demande*	*Item/Référence*	*Date Rec'd/reçu*
1	A12345	Brown, Betsy (D	ADM		$5.00	351627	1997 Anest	25-Jan-03

Total Items For/Total des requêtes pour A12345: 1 **Total Charges/Total des frais: $5.00**

The last 2 col headers merge here in prt preview but are fine in final prt.

This is the Canadian format Cost Center Invoice/Report for Cost Center A12345.

Canadian Format Patron Copy Service Invoice

Patron

Invoice/Facture (Copy Service/Service de copies)
01-Aug-03 to/au 31-Aug-03

20-Sep-2003 **Invoice No/No de facture: P1056 0001CS** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108267

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

Dr[illegible]ada
Beth Israel Deaconess Medical Center
GZ-216
330 Brookline Ave.
Boston, MA 02215

Invoice Total/Montant total facturé: $ 5.00

No.	*Dept/Dép*	*Cost Ctr/Code budgétaire*	*ReqID/No de demande*	*Item/Référence*	*Chg/Frais*	*Date Rec'd/reçu*
1	GAST		COPY0308061	1996 Eur J medicinal chemistry 31():1001-10	$5.00	06-Aug-03

Total Items For/Total des requêtes pour Berrada, Driss: 1 **Total Charges/Total des frais: $5.00**

Canadian Format Dept Copy Service Invoice

Dept (Copy Service)

Invoice/Facture (Copy Service/Service de copies)
01-Aug-03 to/au 31-Aug-03

20-Sep-2003 **Invoice No/No de facture: DGAST 0001CS** **Page 1**

Make Check Payable To/Prière de faire le chèque à l'ordre de:
Agoos Medical Library, Library ILL Fund **Terms/Conditions: NET 30**

Beth Israel Deaconess Medical Center
Agoos Medical Library
One Deaconess Road
Boston, MA 02215

Tél: 617.632-8480
Fax/Télécopieur: 617.632-8316
dyoung3@bidmc.harvard.edu

Our Cost Centre/Code budgétaire: 0108267

Include copy of Invoice or Inv No. with pmt/Retourner une copie de la facture ou le numéro de la facture avec votre paiement

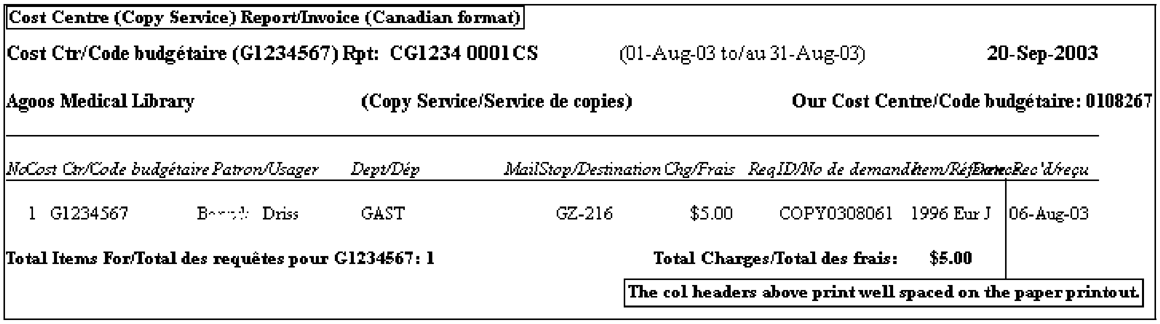
Gastro - East [GAST]
Beth Israel Deaconess Medical Center
DA-501
330 Brookline Ave.
Boston, MA 02215

Invoice Total/Montant total facturé: $ 5.00

No.	*Patron/Usager*	*Cost Ctr/Code budgétaire*	*ReqID/No de demande*	*Item/Référence*	*Chg/Frais*	*Date Rec'd/reçu*
1	B[illegible]da, Driss		COPY0308061	1996 Eur J medicinal chemistry 31():1001-10	$5.00	06-Aug-03

Total Items For/Total des requêtes pour GAST: 1 **Total Charges/Total des frais: $5.00**

Canadian Format Cost Centre Copy Service Invoice



Cost Centre (Copy Service) Report/Invoice (Canadian format)

Cost Ctr/Code budgétaire (G1234567) Rpt: CG1234 0001CS (01-Aug-03 to/au 31-Aug-03) **20-Sep-2003**

Agoos Medical Library **(Copy Service/Service de copies)** **Our Cost Centre/Code budgétaire: 0108267**

No	Cost Ctr/Code budgétaire	Patron/Usager	Dept/Dép	MailStop/Destination	Chg/Frais	ReqID/No de demande	Item/Référence	Date Rec'd/reçu
1	G1234567	[illegible] Driss	GAST	GZ-216	$5.00	COPY0308061	1996 Eur J	06-Aug-03

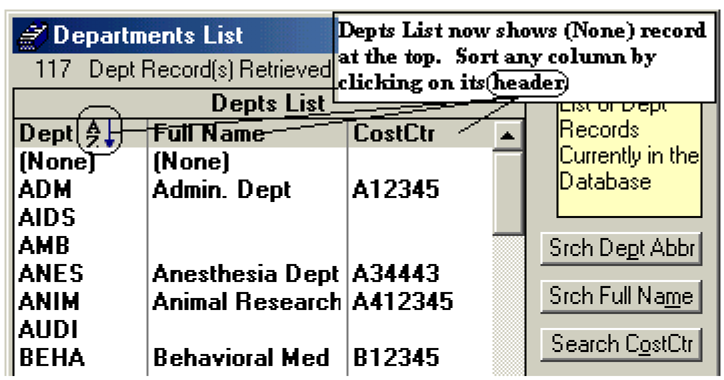
Total Items For/Total des requêtes pour G1234567: 1 **Total Charges/Total des frais: $5.00**

The col headers above print well spaced on the paper printout.

Departments

Departments List now shows (None) Record

Unlike the Patrons List, which has always had the **(None)** record at the top, the Departments List (available under **Lookup** on the **Menu Bar**) has always substituted a **blank space** where (None) should be. This has led to some confusion, so version 2.1.2 reinstates (None) at the top of the list, as in the following example:



QuickDOC Reports

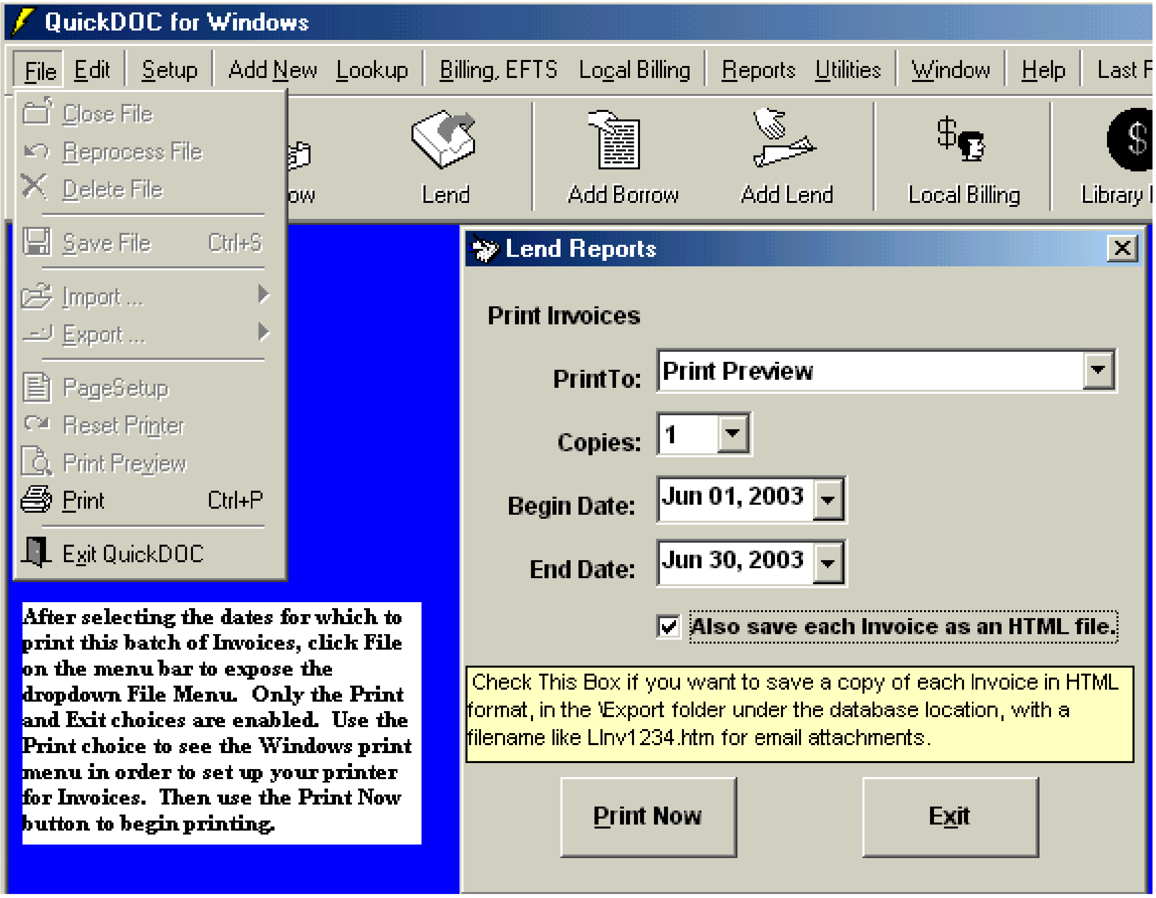
Alternate Print Method for Reports, Invoices using the File Menu

QuickDOC includes dropdown combo boxes on the the Lend Reports and Borrow Reports forms for choosing the **Printer to print to** (as well as the **default Print Preview**) and the **number of copies to print**. In most cases this arrangement will be the easiest to use and most convenient.

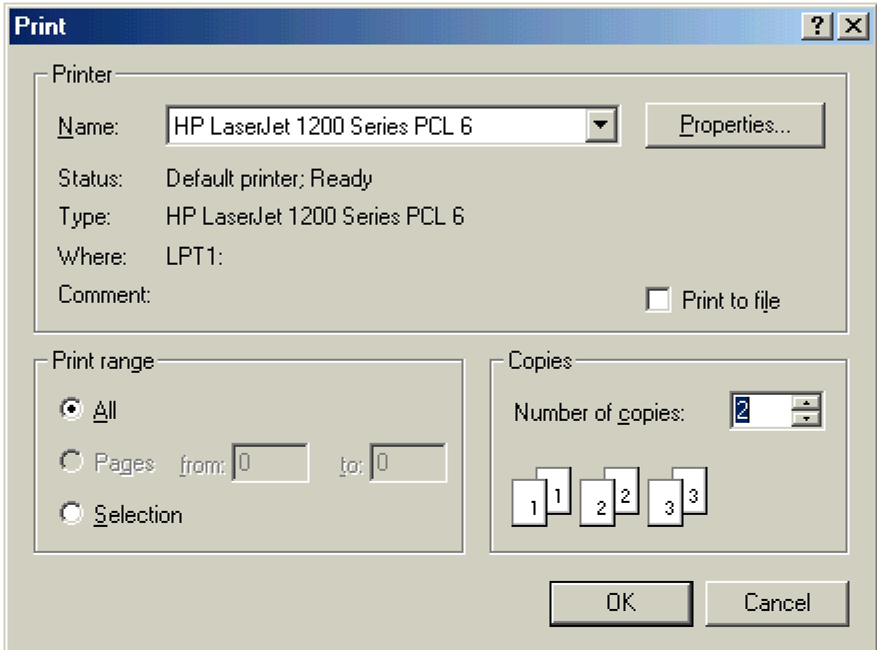
In some situations, however, access to the full **Windows Print Menu** might be necessary in order to set some specific printer value just for the report to be printed. One such option might be the ability of some printers to **collate reports** with **more than one copy** to be printed. Typically, **collation** means that any report set to print more than one copy will first print the first copy all the way through, then the second copy all the way through, etc. In most cases, this is what you want. In some cases, though, and the printing of **multiple copies of Invoices** is the obvious example, this collation is not what you want. Multiple copies of Invoices should stay together, so they can be mailed together.

In order to provide this option, Version 2.1.2 will activate the **Print choice on the File Menu**, in both Lend and Borrow Reports, as well as in their related **Billing, EFTS** and **Local Billing** choices on the

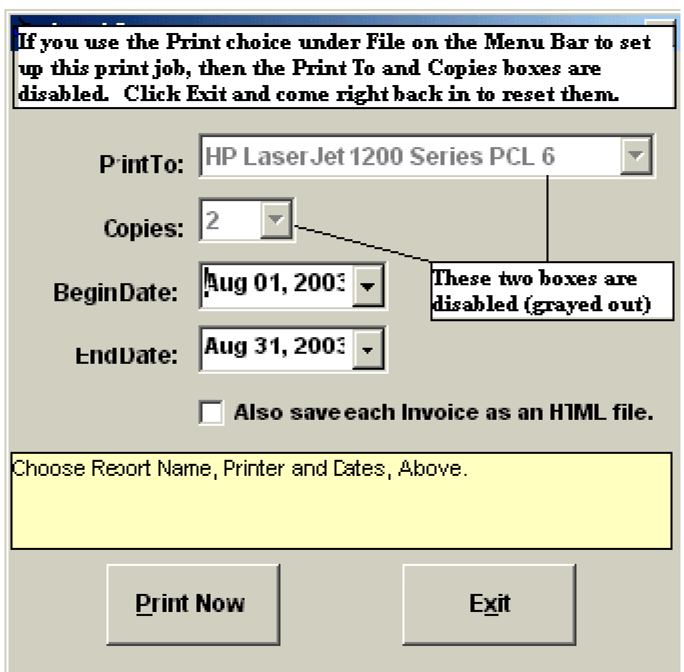
Menu Bar. If you need to set some specific printer setting, use this new method rather than the boxes provided on the QuickDOC Report forms:



Ignore the choices on the Report menu and click File on the Menu Bar, then Print, to get the **Print Menu**. On the Print Menu, select the **Printer Name** you want to use, the **number of copies** you want to print, and any other **Printer Properties** (such as Collate, for example) that you want to apply to this print job.



Your Print Menu may look slightly different, depending upon the version of Windows running on your machine and the printer's capabilities. Once the selections are made, click **Ok** to return to the Report Form.



You'll notice that the **Print To** and **Copies** boxes now show your selections made using the Windows Print Menu, but that they are now **disabled** (grayed out). This alerts you to the current settings and reminds you that the changes were made on the Windows Print Form, not this one. The other values, Begin Date, End Date, etc., are still available and can be changed at any time.

If you want to **stop using the Windows Print Menu settings**, first go back to the Print Menu, using the **File, Print** method. Undo any changes you've made just for this report, so that the **Windows Printer defaults** are returned to their normal settings. Click **Ok** to save the Windows settings, then **Exit** to quit the QuickDOC Report form. When you come back in the Print To and Copies boxes will again be enabled and ready for use.

It's probably a good idea also to get in the habit of revisiting the Windows Print Menu after each report is run and before exiting the QuickDOC Report Form, to avoid leaving the printer at settings that will be an unpleasant surprise when some future report is printed.

Added Turnaround Days by Delivery and Type in Compute Totals

The Compute Totals (Borrowing) Report now also calculates Average Turnaround Time in Days by Delivery Method (Mail, Pickup, etc.), Delivery Type (Physical or Electronic), and Item Type (Journal, E-Journal, Monograph, AV, Original, Copy and---not exactly a type---Rush Request) along with Source on the first page of the report.

24-Oct-2003 — Beth Israel Deaconess Medical Center (01-Jan-03 to 30-Sep-03) — Page 1

Item Source	TOTAL ITEMS	Source % Total	Physical Delivery: Mail	PkUp	Other	(Mono/ A/V)	Electronic Delivery: Web	Ariel	Email	Fax	% Elect	Item Sent To: Library	Patron	Turnaround Avg # Days
DOCLINE	325	98.78%	54			(5)	18	29	127	97	83%	325		3.8
LOANSOME DOC	4	1.22%	2						2		50%	4		9.3
DOCLINE & LD	329	100.00%	56			(5)	18	29	129	97		329		3.9
OCLC														
RLIN														
Mail														
Telephone														
Fax														
Other														
Copy Service														
TOTAL REC'D:	**329**		**56**				**18**	**29**	**129**	**97**		**329**		**3.9**
% of Totals:			**17.02%**				**5.47%**	**8.81%**	**39.21%**	**29.48%**				
Avg # Days:			**7.**				**2.1**	**2.4**	**3.1**	**3.8**				

New rows for computing average # Turnaround Days by Delivery Method, Delivery Type and Item Type are added in version 2.1.2 on the first page of the Compute Totals (Borrowing) Report (in addition to Source).

LOANSOME DOC Activity:	**Total LD Items:**	**4**	**% of All LD:**	**100.00%**	
	Total LD Rec'd:	**4**		**100.00%**	**4**
	Filled by MAUBET:	**4**		**100.00%**	**4**
	Filled on DOCLINE:			**0.00%**	
	Not Filled:			**0.00%**	

	Physical	Electronic	
TOTAL Physical & Electronic FILLS:	**56**	**273**	**329**
% of Totals:	**17.02%**	**82.98%**	
Avg # Days:	**7.**	**3.2**	

By Type:	Jrnls:	E-Jrnls:	Monographs:	AV:	Originals:	Copies:	Rush:
	324		**5**		**1**	**328**	
% of Totals:	**98.48%**		**1.52%**		**0.30%**	**99.70%**	
Avg # Days:	**3.9**		**4.2**		**6.**	**3.9**	

TOTAL ITEMS:	Rec'd	Unsuccessful	Outstanding	Grand Total
	329	**28**		**357**
% of Totals:	**92.16%**	**7.84%**	**0.00%**	

Other Turnaround computations, by Patron Status and Library Group, are on pages two and three of this same report.